

R08

Premier Series Checklist Residential



Premier Series - Residential - Checklist

Forms	Application Forms and Broker Supporting Notes		
	Verification of Identity		
	Valuation Form		
	Servicing Calculator		
All Applicants/ Guarantors	Certified Colour Copy of Passport and Driver's Licence		
	Equifax Credit Report		
	VISA (if applicable)		
Construction	Council Approved Plans & Specifications	Fixed Price Building Contract	
	Building / Planning Permits		
Bridging	Bridging Loan Borrower Declaration		
Income Documents	PAYG		
	2 Payslips + Employment Letter/Contract + employment verification call, or 2 Payslips + 3 months Bank Statements		
	Income can be verified via https://bankstatements.com.au/		
	Full Doc		
	Most recent 2 years Company Tax Returns & Financial Statements		
	Most recent 2 years Personal Tax Returns & Notice of Assessment		
	1 Year Financials (Tax Return + Financial Statements + NOA + BAS if tax return is over 6 months) subject to ABN > 18 months and pricing premium may apply		
	Lite Doc		
	Borrower Repayment Declaration, plus one of the following		
Accountant's Letter (template available)	12 Mos BAS	12 Mos Trading Statements	
Security	New Purchase		
	Contract of Sale	Deposit Receipt	Funds to Complete
	Refinance / Debt Consolidation		
	Latest Council Rate Notice (if applicable)		
	Mortgage: 6 Months Statements (12 months if refinancing a non-conforming loan)		
	Personal Loan / Credit Cards / Other Debts: 3 Months Statements		