

Ultra Variable Loan Submission Checklist



Please complete and supply this checklist with the loan submission

Borrower's Name:

Broker Name:

Email Address:

Loan Purpose:

Application Form

- Completed Application Form **Required with all submissions**
- Completed Servicing Calculator **Required with all submissions**

Identification - Use correct KYC form available from the Mortgage Mart website - MUST BE CERTIFIED

- Drivers Licence **Certified copies required with correct KYC / VOI form supplied**
- Passport **Certified copies required with correct KYC / VOI form supplied**
- Medicare Card **Certified copies required with correct KYC / VOI form supplied**
- Marriage Certificate **Certified copies required with correct KYC / VOI form supplied**
- Change of Name **Certified copies required with correct KYC / VOI form supplied**
- Citizenship Certificate **Certified copies required with correct KYC / VOI form supplied**

Employment

PAYG Borrower - items marked with * are mandatory

- 2 most recent consecutive payslips*
- Most recent Income Statement from ATO* (PAYG Summary)
- 3 months most recent bank statements to show salary deposits*
- Employer Letter
- An Employment Contract or Letter of Offer (if within probation period)
- Tax Returns and ATO Notices **TFN's to be removed**

Self-Employed Borrower - items marked with * are mandatory

- 2 Years Individual Tax Returns* **TFN's to be removed**
- 2 Years ATO Notice of Assessment* **TFN's to be removed**
- 2 Years Company / Trust Tax Returns* **TFN's to be removed**
- 2 Years Financial Statements* **TFN's to be removed**

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Other Acceptable Income Types (if applicable)

- Centrelink Letter - Family Tax A and B accepted if child is less than 12 years of age
- Child Support Agency letter
- Family Assistance Letter
- Lease Agreement
- Rent Appraisal letter
- Rent Tax Invoices
- Superannuation Statement
- Bank Statements to show above incomes received - most recent 3 months

Loan Purpose

Refinances - (if debt consolidation statements for all debts will be required - max 4 debts acceptable)

- 6 month Home Loan statements - most recent
- Current Council Rates Notice
- Discharge Authority Form
- Current months credit card statement
- Current months personal loan statements
- Current months car loan statements

Purchases

- Contract of Sale
- Bank Statements to show Savings history
- Bank Statements to show funds available
- Stat Declaration if gift from Giftee
- (Gifto's) Account statement
- Draft TRANSFER

Construction Loans - Single Dwelling

- Copy of Fixed Price Building Contract
- Copy of Plans & Specifications
- Copy of Building & Planning Permits
- Copy of GST Declaration

Other assessment information