

Ultra Variable Loan Submission Checklist



Borrower's Name:

Broker Name:

Email Address:

Loan Purpose:

Application Form

- | | | |
|--------------------------|--------------------------------|--------------------------------------|
| <input type="checkbox"/> | Completed Application Form | Required with all submissions |
| <input type="checkbox"/> | Completed Servicing Calculator | Required with all submissions |

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

- | | | |
|--------------------------|-------------------------|---|
| <input type="checkbox"/> | Drivers Licence | Certified copies required with correct Face 2 Face KYC form supplied |
| <input type="checkbox"/> | Passport | Certified copies required with correct Face 2 Face KYC form supplied |
| <input type="checkbox"/> | Medicare Card | Certified copies required with correct Face 2 Face KYC form supplied |
| <input type="checkbox"/> | Marriage Certificate | Certified copies required with correct Face 2 Face KYC form supplied |
| <input type="checkbox"/> | Change of Name | Certified copies required with correct Face 2 Face KYC form supplied |
| <input type="checkbox"/> | Citizenship Certificate | Certified copies required with correct Face 2 Face KYC form supplied |

Employment

PAYG Borrower - items marked with * are mandatory

- | | | |
|--------------------------|--|----------------------------|
| <input type="checkbox"/> | 2 most recent consecutive payslips* | |
| <input type="checkbox"/> | Most recent Income Statement from ATO* | |
| <input type="checkbox"/> | 3 months most recent bank statements to show salary deposits* | |
| <input type="checkbox"/> | Employer Letter | |
| <input type="checkbox"/> | An Employment Contract or Letter of Offer (if within probation period) | |
| <input type="checkbox"/> | Tax Returns and ATO Notices | TFN's to be removed |

Self-Employed Borrower - items marked with * are mandatory

- | | | |
|--------------------------|--------------------------------------|----------------------------|
| <input type="checkbox"/> | 2 Years Individual Tax Returns* | TFN's to be removed |
| <input type="checkbox"/> | 2 Years ATO Notice of Assessment* | TFN's to be removed |
| <input type="checkbox"/> | 2 Years Company / Trust Tax Returns* | TFN's to be removed |
| <input type="checkbox"/> | 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

Other assessment information
