

This form is mandatory and to be lodged WLTH Home Loan Application - Load into LoanApp under "Other Documents" Contact scenarios@wlth.com if you are unable to provide any of the requirements before submitting the application. WLTH Broker Portal - For more information and all supporting documents, policy, interest rates and servicing calculators <https://www.mortgage-mart.com.au/>

SMSF Trustee Name (Corporate Trustees Only)

LoanApp Reference Number

For all SMSF Applications.

- Signed Mortgage Mart Application Form
- Signed Broker Declaration
- Privacy Consent form
- Mortgage Mart Servicing Calculator
- Broker Submission Notes
- Mortgage Mart Verification of Identity form completed in full
- Most Recent years SMSF Auditor Reports - Established SMSF Only
- Most Recent Financial Years Audited SMSF Trust Tax Returns & Full Financial Statements - Established SMSF Only
- Proposed Superannuation Declaration Form - If Applicable
- Certified Copy of Bare Trust
- Certified Copy of SMSF Trust Deed
- Exit Strategy - If any applicant is 55 or older, please provide an applicant signed and dated exit strategy
(Separate to broker submission notes/application)

SMSF Purchase

- Signed & Dated Contract of sale
- Evidence of Funds to complete
- Valuation Report

SMSF Refinance

- Most Recent 3 Months Loan Statements
- Most Recent Council Rates Notice
- Valuation Report
- Signed Discharge Form - Noting Green Mortgage Lawyers Phone: +61 7 3052 9000
Email: newlending@greenmortgagelawyers.com

Income

PAYG Employment

- 2 Most Recent Payslips <30 Days old **AND**
- Latest 3 month's Salary Credit Statements <30 days old **AND**
- Most recent ATO Income statement **AND**
- If SGC Contributions are not being paid to the SMSF already, email from applicant(s) stating that all future SGC payments will be directed to the SMSF.

Self Employed / Company / Trust

- Latest Personal Tax Return **AND**
- Latest Personal ATO notice of assesment **AND**
- Latest Tax Return & Financial Statement for Company, Partnership or Trust **AND**
- Current ATO Portal Confirming Any or Nil Liabilities
- IF SGC Payments currently directed to industry super fund, Provide the latest 12 months of industry superannuation fund contributions

Commercial Security

- Most Recent 6 Months Rental Statements **AND**
- Commercial Valuation Report <60 days old **AND**
- If Vacant, Real Estate Rental Appraisal letter including details related to the outgoing expenses

Residential Security

- Most recent Rental Income Statement <30 days old **OR**
- Signed Lease Agreement

Pre-Approval Application

- SMSF Pre-Approval Income Declaration

Note: The lowest \$ Amount will be utilised if multiple rental income documents are supplied for the same security (i.e valuation report and rental appraisal)