

# Mortgage Mart SMSF

## Supporting Document Checklist



This form is mandatory and to be lodged Mortgage Mart 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.

SMSF Trustee Name - Mortgage Mart accept Corporate Trustees Only

LoanApp Reference Number

Loan Split 1 \$

# Offsets Required? (1-4)

Loan Split 3 \$

# Offsets Required? (1-4)

Loan Split 2 \$

# Offsets Required? (1-4)

Loan Split 4 \$

# Offsets Required? (1-4)

### Required on ALL SMSF Applications.

- ☐ Corporate Trustees Only
- ☐ Signed Mortgage Mart Application Form
- ☐ Signed Broker Declaration & Privacy Consent form.
- ☐ Mortgage Mart Servicing Calculator
- ☐ Broker Submission Notes OR WLTH Application Notes
- ☐ Mortgage Mart Verification of Identity form completed in full
- ☐ Satisfactory Valuation Report - if completed up-front
- ☐ Most Recent years SMSF Auditor Reports - Established SMSF Only
- ☐ Most Recent Financial Years Audited SMSF Trust Tax Returns & Full Financial Statements - Established SMSF Only
- ☐ Accountants Letter to confirm ongoing Annual Cost - Newly Established Only
- ☐ Certified Copy of Bare Trust
- ☐ Certified Copy of SMSF Trust Deed
- ☐ ASIC Certificate of Registration for the SMSF Trust Deed
- ☐ ASIC Certificate of Registration for the SMSF Bare Trust
- ☐ ALL TFNs are redacted prior to submission
- ☐ 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 in SMSF Fund OR
- ☐ Cash Management Account <30 days old OR
- ☐ IF the SMSF isn't established, a Letter from Adviser confirming Rollover amount <30 Days old

### SMSF Refinance

- ☐ Most Recent 3 Months Loan Statements <30 days old Most
- ☐ Recent Council Rates Notice
- ☐ 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
- ☐ Latest PAYG Summary 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 Returns (2 Years if Sole Trader) AND
- ☐ Latest Personal Tax Assessment Notices (2 Years if Sole trader) AND
- ☐ Latest 2 years Tax Returns & Financial Statements for all Company, Partnerships or Trusts AND
- ☐ Current ATO Portal Confirming Any or Nil ATO Liabilities
- ☐ IF SGC Payments currently directed to industry super fund, Provide the latest 12 months of industry superannuation fund contributions

#### Commercial Security

- ☐ Most Recent 12 Months Rental Statements AND
- ☐ Commercial Valuation Report <60 days old AND
- ☐ Most Recent 3 months Banks Statements OR
- ☐ Vacant Real Estate Rental Appraisal letter including details related to the outgoing expenses

#### Residential Security

- ☐ Most recent Rental Income Statement <30 days old OR
- ☐ Rental Appraisal Letter <30 days old OR
- ☐ Valuation Report <60 days old
- ☐ Vacant Real Estate Rental Appraisal letter including details related to the outgoing expenses

#### 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)