

This form is to be lodged with the Mortgage Mart SMSF Easy Refinance Calculator which can be located on the following page <https://www.mortgage-mart.com.au/ocean-ultra-smsf>

SMSF Trustee Name

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)

The following is mandatory to qualify for ALL SMSF Easy Refinance Applications.

Most recent 12 Months loan statements

AND

Most recent Rental Income Statement

Most Recent SMSF cash management account (CMA) statement

Confirm Mortgage Mart product is Lower cost than loan being refinanced
(Lower Interest Rate, Lower Repayments, AND LVR does not exceed 80%)

Confirm LRBA running at least 12 months old

Tenanted for a minimum of 12 months

Corporate Trustees only

Signed Mortgage Mart Application Form

Privacy Consent form Signed by applicants

Signed Broker Declaration

Mortgage Mart SMSF Easy Refinance Servicing Calculator

Broker Submission Notes OR Mortgage Mart Application Notes

Mortgage Mart Verification of Identity form completed in full

Satisfactory Valuation Report - if completed up-front (Must not exceed 80% LVR)

Most Recent years SMSF Auditor Reports

Certified Copy of Bare Trust

Certified Copy of SMSF Trust Deed

Accountants Letter (Required when there is other company directorships not party to the application to confirm trading profitable or not trading at all)

Most Recent council rates notices for security property

Signed Discharge Form - Noting - Green Mortgage Lawyers - Phone: +61 7 3052 9000 - Email: newlending@greenmortgagelawyers.com

Exit Strategy - If any applicant is 55 or older, please provide an applicant signed and dated exit strategy
(Separate to broker submission notes/application)

If you are unable to provide any of the requirements above, please proceed to a full document SMSF Application