

Ocean/Ultra SMSF Easy Refinance

Supporting Document Checklist



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