

SMSF Trustee Name (Corporate Trustees Only)

LoanApp Reference Number

For all SMSF Easy Refinance Applications.

- Most recent 12 Months loan statements
- Most recent Rental Income Statement
- Most Recent SMSF cash management account (CMA) statement
- Signed Mortgage Mart Application Form
- Privacy Consent form Signed by applicants
- Signed Broker Declaration
- Mortgage Mart Easy Refinance Servicing Calculator
- Broker Submission Notes
- Mortgage Mart Verification of Identity form completed in full
- Satisfactory Valuation Report
- Most recent SMSF Auditor Report
- 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