

SMSF Easy Refinance Calculator



Documentation Checklist

Application

- Application Form (Generated via LoanApp)
- Electronic Signature Certification of Completion (Generated via LoanApp)
- Privacy Consent
- Loan Summary
- Broker Declaration
- SMSF Easy Refinance Calculator

SMSF Trust

- Certified SMSF Trust Deed
- Most recent years SMSF Tax Return
- Most recent years SMSF Financial Statement
- Most recent years SMSF Audit Report

Bare Trust

- Certified SMSF Bare Trust Deed

Company (Guarantor)

- Equifax reports
- One of the following:
 - Certificate of Registration
 - ASIC Search

Company (Borrower)

- Equifax reports
- One of the following:
 - Certificate of Registration
 - ASIC Search

Individual (Guarantor)

- Verification Of Identity
- Credit Report
- Certified ID

Security Property

- One of the following two:
 - Rental Statement showing 12 months of rental income;
 - SMSF Cash Management Account statements showing 12 months of rental income;
- Both of the following:
 - Valuation Report;
 - Rates Notice

Refinancing Liability

- SMSF Loan statement (12 Months)
- Or BOTH of the following:
 - SMSF Cash Management Account statements showing 12 months of SMSF Loan repayment;
 - Most recent SMSF Loan Statement;