



LoanSummarySnapshot

BDM Name

Broker Name

Applicant Name(s)

MMA Product (e.g. Ultra SMSF)

Loan Purpose (e.g. purchase)

Proposed Settlement Date

Loan Amount

LVR

Interest Rate

Valuation ordered?

Yes or No

Please note NDIS or Co-Living SLA for valuation report delivery is usually up to 5 weeks.

*Passes Serviceability?

Yes or No

*if Assessment NDI is not passing then do not submit the application for assessment until it does.

^Loan checklist completed?

Yes or No

^if all requested documents are not available at lodgement please identify below & provide explanation.

Application Notes/Background Story (the more detail you tell us now will help speed up assessment)