



# SMSF Refinance Prime Loan Application Checklist

Primary Borrower	Your Reference		
Date	Product	SMSF	SMSF Express Refi

## Application Details

Loan Application with privacy consent form (fully completed, signed & dated)  
Cover sheet  
Credit Note  
SMSF Servicing Calculator **OR** SMSF Express Refinance Serviceability  
Equifax Reports for each individual guarantor, SMSF trustee company and SMSF Bare Trust  
*(Note: past 2 years enquiries must be addressed in Credit Note)*  
Valuation (attached/ordered)  
Evidence of funds to complete (if applicable)

## Borrower Identification

Certified SMSF Trust Deed  
Certified SMSF Bare Trust Deed

## For Each Individual (Guarantor)

KYC & VOI Identification Form  
Certified Identification documents attached:

- Passport
- Drivers Licence/Government issued Photo Card
- Marriage/change of name certificate

## Loan Purpose — Supporting Documents

2 Years clear SMSF loan statements\*  
12 months rental statements/rental credits\*  
Current rates notice for the security

*\*NOTE: Not older than 45 days at approval*