

SMSF Refinance Prime Loan Application Checklist

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 Ioan statements* 12 months rental statements/rental credits* Current rates notice for the security	Primary Borrower Date	Your Reference Product	SMSF	SMSE Everage Dofi	
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	*NOTE: Not older than 45 days at approval				