

# Documentation Checklist

When applying for a home loan you will need to provide the following documentation.  
This supporting documentation substantiates your income/expenditure and assets/liabilities.

Please tick

<b>INCOME</b>	<ul style="list-style-type: none"> <li>• Two recent computerised payslips. <input type="checkbox"/></li> <li>• Letter from employer stating position, commencement date, if still on probation, gross income, year to date, regular overtime and allowances. <input type="checkbox"/></li> <li>• Copy of employment contract. <input type="checkbox"/></li> <li>• Last year's group certificate or tax return. <input type="checkbox"/></li> </ul> <p><i>If self employed:</i></p> <ul style="list-style-type: none"> <li>• Last two/three year's tax returns (if company/family trust applicable, you will require company tax returns, memorandum and articles of association, copy of trust or deed). <input type="checkbox"/></li> <li>• Copy of tenancy agreement for all owned investment properties or a letter from a real estate office to confirm the estimated rental income. <input type="checkbox"/></li> </ul>
<b>ASSETS</b>	<ul style="list-style-type: none"> <li>• Copy of savings history (passbook, statements, certificates for six months). <input type="checkbox"/></li> <li>• Copy of sale contract on existing home or settlement letter from your solicitor if the deposit is to come from the sale of an existing home. <input type="checkbox"/></li> <li>• Statutory declaration (if any part of the deposit is a gift), stating the amount of the gift and that it is non-repayable. <input type="checkbox"/></li> <li>• Rates notice on any existing owned properties. <input type="checkbox"/></li> <li>• Copy of superannuation statements, share certificates etc. <input type="checkbox"/></li> </ul>
<b>LIABILITIES</b>	<ul style="list-style-type: none"> <li>• Copy of loans statements for 6 / recent months on any existing mortgages. <input type="checkbox"/></li> <li>• Copy of credit card and personal loans statements and statements from any other borrowings. <input type="checkbox"/></li> </ul>
<b>OTHER</b>	<ul style="list-style-type: none"> <li>• Copy of purchase contract <input type="checkbox"/></li> <li>• Copy of plans, specifications and fixed price contract (construction/renovations) <input type="checkbox"/></li> <li>• Cheque for establishment fees if required <input type="checkbox"/></li> </ul>
<b>PROOF OF IDENTITY</b>	<ul style="list-style-type: none"> <li>• Drivers licence - 40 points. <input type="checkbox"/></li> <li>• Passport or birth certificate – 60 points. <input type="checkbox"/></li> </ul> <p><i>(If the above cannot be located other acceptable documents can be used such as Medicare Card, bank account statements, etc. 100 points required.)</i></p>

NOTES: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

