

APPOINTMENT CHECKLIST



We have prepared a checklist for your convenience to ensure your appointment runs smoothly and efficiently. Use this list to collate the important documentation that will be required by a prospective lender.

INCOME DOCUMENTATION

- 2 most recent payslips
- Most recent Group Certificate (PAYG Summary)

OTHER INCOME

- Rental income statement (monthly)

SUPPORTING DOCUMENTS - dated within 30 days

- Last 6 months statements - Mortgage
- Last 6 months statements – Personal loan
- Last 6 months statements – Other debts
- Last 6 months statements – Credit cards
- Copy of Rates Notice (paid and up to date)
- Last 6 months statements - All transactions & savings accounts

GIFTS

- Gift – Statutory Declaration (signed and witnessed by authorised person)

PURCHASE DOCUMENTS

- Executed copy of Contract of Sale (signed by purchaser and vendor)
- Copy of Deposit/receipt (where deposit has been paid)
- Conveyancer contact details

SELF EMPLOYED APPLICANTS - last 2 years

- Personal Tax Returns
- Tax assessment notices: most recent
- If trading as a company / trust / partnership we will also require: latest profit and loss, balance sheet and tax returns

CONSTRUCTION LOANS

- Executed copy of Fixed Price building contract, plans and specifications

IDENTIFICATION

The following identity documents are required by the lender. See examples listed below:

- Drivers licence (front and back)
- Passport

OTHER SUPPORTING DOCUMENTS

The following documents are also required under our responsible lending obligations:

- Superannuation Statements
- Insurance Policies



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