

## Supporting Document Checklist

In order for your client(s) application to proceed to the assessment stage, we will require the following documents to be provided, as applicable. Note: The below items are mandatory in order to progress to assessment (where applicable).

### INFORMATION TO INCLUDE WITH EVERY RESIMAC APPLICATION

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| <input type="checkbox"/> Completed application form signed by all applicants   | <input type="checkbox"/> Exit Strategy - In writing via a direct email or a signed and dated letter, from the applicant/s where the loan term will exceed the expected retirement age |
| <input type="checkbox"/> Signed Privacy Consent for all applicants   | <input type="checkbox"/> Detailed loan submission notes clearly identifying the borrowers requirements & objectives   |
| <input type="checkbox"/> Fully completed Living Expense Declaration  | <input type="checkbox"/> Equifax Reports (Individual, Company and for all directorships)  |
| <input type="checkbox"/> Serviceability Calculator   | <input type="checkbox"/> Completed Broker Preliminary Assessment  |
| <input type="checkbox"/> Identification documents for all applicants and guarantors on the loan and completed Customer ID Form |   |

### IF PAYG (REQUIRED)

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| <input type="checkbox"/> 2 of 3 most recent computer generated payslips showing as a minimum: <ul style="list-style-type: none"> <li>▪ Borrower name</li> <li>▪ Employer name</li> <li>▪ ABN</li> <li>▪ Year to Date earning</li> </ul> | If the documents listed to the left are unavailable, the following must be obtained for each borrower: <ul style="list-style-type: none"> <li><input type="checkbox"/> One computer generated payslip; and</li> <li><input type="checkbox"/> The latest PAYG Payment Summary or ATO Tax Assessment Notice</li> </ul> |
| <b>OR</b><br><input type="checkbox"/> 3 months statements from a financial institution showing regular salary credits with the name of the employer evident   | Note: If variable income e.g. OT used, latest PAYG Payment Summary or ATO Tax Assessment Notice is required.<br><br>If PAYG Contractor, please also provide: <ul style="list-style-type: none"> <li><input type="checkbox"/> Employment Contract</li> </ul>  |

### IF SELF-EMPLOYED (REQUIRED)

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| <input type="checkbox"/> Proof of self-employed income<br><b>Full Doc</b><br><input type="checkbox"/> Last 2 years certified tax returns and tax assessment notices (business and personal tax returns where applicable) | <b>Alt Doc</b><br><input type="checkbox"/> Declaration of financial position (signed by each applicant and guarantor, where applicable), plus one of the following: <ul style="list-style-type: none"> <li><input type="checkbox"/> Accountant's Letter (not available where ABN less than 12 months)</li> <li><input type="checkbox"/> 3 months business bank statements</li> <li><input type="checkbox"/> 6 months lodged ATO Business Activity Statements</li> </ul> |
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### IF REFINANCING (REQUIRED)

- Proof of Mortgage Loan Conduct (6 months statements required)
- Unsecured debts being consolidated (Prime - 6 months loan statements, 3 months credit card statements or Specialist - 1 month loan or credit card statement)
- Copy of most recent Council Rate Notice for all security properties

### OTHER INCOME (REQUIRED)

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| <b>Child Support</b><br><input type="checkbox"/> Proof of receipt of maintenance for a continuous period of at least 6 months (Prime) or 3 months (Specialist) by way of savings statements, and Child Support Agency letter to confirm the maintenance agreement | <b>Proof of Rental Income</b><br><input type="checkbox"/> Most recent rental statement from Real Estate Agent; or<br><input type="checkbox"/> Last 3 months Bank Statements to confirm rental credits<br><input type="checkbox"/> Rental appraisal letter from Real Estate Agent (new investment property purchases only) |
| <b>Centrelink Benefits</b><br><input type="checkbox"/> Evidence of Centrelink benefits being received by way of Centrelink statement  |   |

### IF PROPERTY BEING PURCHASED

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| <input type="checkbox"/> Copy of the Contract of Sale | <input type="checkbox"/> Proof of funds to complete |
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