

# SUPPORTING DOCUMENTS CHECKLIST

It is critical to our advice that you supply the following documents prior to your first appointment.

## INCOME DETAILS

### IF PAYG

- Two most recent consecutive pay slips to include YTD figures for at least 3 months OR annual salary
- Most recent PAYG Payment Summary

### IF EITHER TEMPORARY OR CONTRACTOR/NEW EMPLOYMENT ROLE

- Copy of Employment Contract

### IF SELF EMPLOYED SOLE TRADER

- Individual tax returns for the last two financial years (including ATO Assessment notices)

### IF SELF EMPLOYED (COMPANY OR PARTNERSHIP)

In addition to the above individual requirements, we will also require:

- Full financial statements and tax returns for the last two financial years

### RENTAL INCOME

- Most recent rental income statement

### PENSIONS, FAMILY ALLOWANCE - IF YOU RECEIVE OR PAY

- Centrelink Pensions** – letter of assessment detailing income/benefits and most recent three months bank statements showing the payments being credited
- Family Allowance** – recent Centrelink statement detailing income/benefit and most recent three months bank statements showing the payments being credited

### SAVINGS AND EVERYDAY BANKING ACCOUNTS

- Most recent three months bank statements for all transactional accounts showing salaries being credited and savings available (must also show running balances, account name and account number)

## LIABILITIES

- Home loans** – most recent statement is required for all loans (any loans being refinanced please provide six months statements)
- Personal loans** – most recent statement is required (if being refinanced please provide six months statements)
- Equipment finance/car leases** – most recent statement as well as copy of loan contract (if being refinanced please provide six months statements)
- Credit cards** – most recent statement (if any credit cards are being refinanced please provide three months consecutive statements)
- Interest free loans** – copy of contract
- HECS/HELP/TRADE loans** – statement from the HECS portal showing the balance owing and your full name
- Child Support/Maintenance Payments** – please provide court order showing minimum payment

## COUNCIL RATES

- Most recent council rates notice for all properties owned

## IDENTIFICATION

- Copy of current Driver's Licence showing current residential address
- Copy of current Passport (if passport unavailable please provide copy of birth certificate)
- Copy of Medicare Card
- If applying for First Home Owners Grant - please provide copy of Birth Certificate in addition to Licence, Passport and Medicare card

## \*\*HELP WITH BANK STATEMENTS

If you find it difficult in locating or sending through the bank statement requirements please let us know as we have other options/software available to help gather these documents.

