

Documentation Checklist

This checklist has been developed to assist you in preparing documentation. Your Financial Specialist will assist you with this list to ensure that you are fully prepared.

Your Name

Prepared on

Proof of Identity

Passport/Visa/Citizenship Certificate

Drivers Licence

Marriage Certificate

Birth Certificate

Medicare Card

Your Income

Most recent two payslips

Employment Contract

Group Certificate

Centrelink Statement

Rental Income

Your Assets

Recent saving account statement

Superannuation Statement

Statutory Declaration of any gifts

Your Liabilities

Most recent statement for **ALL** credit cards

Recent statement of personal loan

Last 6 months loan statements for any existing mortgages

Other

Home insurance certificates for all properties owned

Contract of sale for property being purchased