



SMSF Supporting documents checklist

All applications

- Signed loan application form with submission notes
- SMSF Serviceability Calculator
- Recent Super Fund Statement/s evidencing contributions, cash, investments, rentals
- Evidence of Rental of the proposed property, and Rental statements for any other properties held by the fund not taken as security (if applicable)

PAYG & PAYG Self Employed– Income Verification

- 2 most recent payslips evidencing super contributions

Self Employed Members – Income Verification

- Last two years SMSF Cash Management Account Statements or existing Superannuation statements to be rolled over, evidencing contributions, cash, investments

New Purchase Applications

- Contract of Sale (fully signed and dated) for the property being purchased with either
 - Trustee of Bare Trust/Property Trust as purchaser; or
 - In VIC, SA and TAS only, a copy of a nomination form nominating the Trustee of the Bare Trust/Property Trust as purchaser.

Refinance Applications

- Previous independent legal advice
- 6 months statements for the loan being refinanced

Trust Documentation

- Certified copies of SMSF Trust Deed and any Deeds of Variation
 - Be sure to check with applicants whether any variations have been made to the original Trust Deed
 - If the SMSF Trust Deed does not contain a list of members, please provide signed SMSF Membership Applications for each member.
- Certified copy of Bare Trust/Property Trust Deed
- Confirmation that SMSF is compliant on Super Fund Lookup