

Mortgage

Document Requirements

The below documentation and Information is required to assist us in helping you undertake a home loan.

Please upload the below documents to the link provided in your email.

DOCUMENTS	COMMENTS
<input type="checkbox"/> Excel Financial Advisors Credit Guide	<i>Signed by all applicants (Link in Email)</i>
<input type="checkbox"/> Data Capture (includes living expenses)	<i>Attached to Email</i>
<input type="checkbox"/> Borrower Disclosure Form	<i>Signed by all applicants (link in Email)</i>
<input type="checkbox"/> Equifax Privacy Consent Form	<i>Signed by all applicants (link in Email)</i>
<input type="checkbox"/> Last 2 Payslips	<i>For each applicant</i>
<input type="checkbox"/> Bank Statement for the past 3 months	<i>Showing bank logo, full name of account, account number, transaction details including date and running balances</i>
<input type="checkbox"/> Credit Card and/or Store Card (including Afterpay, ZIP etc Statements for the past 3 months	<i>Showing bank logo, full name of account, account number, transaction details including date and running balances</i>
<input type="checkbox"/> Home Loan Statements for the past 6 months	<i>Showing bank logo, full name of account, account number, transaction details including date and running balances</i>
<input type="checkbox"/> Latest Superannuation Statements	
<input type="checkbox"/> Copy of Council Rates Notice	<i>For all properties owned</i>
<input type="checkbox"/> Rental Property Income	<i>Please provide a Rental Statement from agent for the past 2 months, if private rental - bank statement showing income.</i>
<input type="checkbox"/> Repayment Confirmation letter	<i>If loans have recently been paid, confirmation letter from vendor</i>
<input type="checkbox"/> Centrelink Statement	<i>If you receive Centrelink payments or are in debt please supply a statement</i>
<input type="checkbox"/> ATO Statement / Repayment Plan	<i>If you have a debt with ATO please supply letter and repayment plan.</i>