

Self Managed Super Fund Loan Application Checklist

This checklist is a guide to the standard mandatory documents required as part of your Bluestone application. For an accurate list of document requirements specific to your application, please refer to the Supporting Documents tab on your online lodgement and upload your documents directly onto your application.

Introducer Details (please fill in all fields)

Name:	Company Name:
Telephone:	Aggregator:
Mobile:	Email:

Application Documents

Forms

Signed application form:

Privacy consent form - see page 2 & 3

Bluestone declarations form

Bluestone ID requirements - verification form and supporting ID documents
(If borrowers have been Bluestone ID verified less than 2 years ago, this is not required)

Bluestone SMSF servicing calculator

SMSF & security trust documents

SMSF Trust Deed (full deed)

Security Trust Deed (full deed)

Security

Purchase:

Contract of sale

Bluestone valuation will be relied on for proposed rental income where applicable

Funds to complete evidence

Refinance:

Rate notice

6 months statements for the loan being refinanced

3 months most recent rental credits via bank statements or managing agent statements

Copy of previously executed lender independent legal advice certificate if available

Copy of existing SMSF loan agreement to be refinanced

Superannuation Financial position

2 years SMSF returns and financial statements (audited)

Last 6 months Cash Management Account statements

For newly established SMSFs - Most recent retail superannuation fund statements

Other liquid asset confirmation - Current shareholding summary report and investment statements (term deposit, managed funds)

Income and contribution details

PAYG

Super guarantee confirmation - 2 recent payslips with at least 1 dated within 4 weeks of the application date

Self-employed

2 years SMSF Returns and Financial Statements (audited) reflecting super contributions,

For newly established SMSFs, 2 years retail superannuation fund statements

Additional contributions

If additional concessional contributions are required for servicing:

PAYG

Existing - Minimum of 12 months regular history - 12 months of SMSF Cash Management Account or 12 months Retail Superannuation funds statements (if newly established SMSFs);

OR

Proposed - Less than 12 months historic evidence

Complete the Members assets, liabilities and expenses sections on the application form (pages 6 & 7)

Complete the standard serviceability calculator and follow the SMSF additional contributions guidance under section 4 - Mortgage Features

Rental Income - 3 months most recent credits via bank statements or managing agent statements (if applicable)

Self-employed

Proposed - If less than 2 years historic evidence:

Complete the Members assets, liabilities and expenses sections on the application form (pages 6 & 7)

Complete the standard serviceability calculator and follow the SMSF additional contributions guidance under section 4 - Mortgage Features

2 years lodged business and individual tax returns

Rental Income - 3 months most recent credits via bank statements or managing agent statements (if applicable)

By signing below, you agree that all the information that you have provided is true and correct:

Introducer declaration

I, _____ hereby declare that I have satisfied all of the mandatory documentation requirements and I understand that this loan application will not be approved until all Bluestone requirements, including credit decision, have been satisfied.

Signed:

Date: