

VIBE Easy Refi SMSF Checklist

Application Name: _____

Mandatory Support Documents

Application

- | | |
|---|---|
| <input type="checkbox"/> Application form generated via LoanApp | <input type="checkbox"/> SMSF Easy Refinance Servicing Calculator |
| <input type="checkbox"/> Electronic Signature Certification of Completion (generated via LoanApp) | <input type="checkbox"/> Privacy Consent |
| <input type="checkbox"/> Scene Fin Broker Summary & Declaration (Manual Form) | |

SMSF Trust

- | | |
|--|---|
| <input type="checkbox"/> Certified SMSF Trust Deed | <input type="checkbox"/> Most recent years SMSF Financial Statement |
| <input type="checkbox"/> Most recent years SMSF Tax Return (ensure TFN's are removed) | <input type="checkbox"/> Most recent years SMSF Audit Report |

Bare Trust

- Certified SMSF Bare Trust Deed

Company (Guarantor) - Include 1 of the 2 following options:

- Certificate of Registration **OR**
- Copy of ASIC search


Company (Borrower) - Include 1 of the 2 following options:

- Certificate of Registration **OR**
- Copy of ASIC search



Individual (Guarantor) - Must include both of the following 2 options

- Verification of Identity (VOI) completed
- Certified ID

Security Property

- Rates Notice (showing no arrears) 
-  **And** 1 (one) of the following 2 items:
- Last 12 mths rental statements **OR**
- SMSF CMA showing last 12 months rental income (*please include the most recent rental statement with this option*)

Refinancing Liability

- SMSF Loan Statement (last 12 months) 
-  **OR BOTH** of the following:
- SMSF Cash Management Account showing last 12 months loan repayments
- Most recent SMSF Loan Statement