

**Here is a checklist of the paperwork we will need for our meeting, please feel free to call me on 0447 266639 if you have any questions about it. Kind regards Don Johnson.**

**CONFIRMATION OF INCOME – If you are a Salary/Wage Earner, please provide us with:-**

Your last 2 computerised payslips - must be for **consecutive** pay periods. (Both of you) **AND**  
**Your last year's PAYG summaries (Group certs)** (Both of you)

**IF YOU ARE SELF EMPLOYED please provide us with:-**

The last 2 years financials & tax returns for your company/trust/partnership (If applicable) and  
Your last 2 year's personal tax returns & assessment notices . If you are a sole trader then please  
provide your last 2 years tax returns & assessment notices.

**EXISTING & ONGOING COMMITMENTS/SAVINGS please provide us with:-**

- A Copy of the last month's statement for any personal transaction accounts.
- A copy of the last month's statements for any credit cards you have.
- A copy of the last 6 months statement's for your savings account(s) showing your contribution towards the deposit.

**IF YOU ARE REFINANCING please provided us with:-**

- A copy of the last 6 month's statements for any home, investment or personal loans to be refinanced
- A copy of the last 3 month's credit/store card statements to be refinanced

**FOR A PROPERTY PURCHASE (Only when you have signed a contract to purchase the property)**

- A Copy of the completed Contract of Sale(must include details of vendor/s, property address, all inclusions and purchase price)
- If you are buying land & building please also provide
- A copy of the fixed price building contract
- A copy of the plans & specifications.

**CUSTOMER IDENTIFICATION**

- 100 Point Identification is required.
- Please provide your Driver's License & current passport or birth certificate.

**ADDITIONAL DOCUMENTATION**

- A copy of your Medicare card AND A copy of your latest superannuation statement.
- A copy of the rates notice for any properties owned.
- A copy of the latest tenancy agreement & rental statements for your investment property(s)

Kind regards

Don Johnson  
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