



HOME LOAN APPLICATION MEETING

Preparing your application

NOTHING BEATS
COMING HOME.



HOME LOAN APPLICATION MEETING

AGENDA

1. ID YOU completion *10 min*
2. Income *10 min*
3. Expenses *5 min*
4. Assets *10 min*
5. Liabilities - Equifax Report Discussion *10 min*
6. Confirmation of Needs & Objectives *3 min*
7. Product Requirements *3 min*
8. Consider Options *10-20 min*
9. Product recommendation discussion *10 min*
10. Next steps & Points of contact *5 min*

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WHAT YOU WILL NEED

1. Online Access to: MyGov, Internet Banking, Super Fund
2. 100 Points ID: Drivers Licence, Passport, Medicare Card
3. Payslips and tax returns
4. Information about your private health insurance, private school fees, body corp/rates
5. Details of assets - savings BSB & account numbers, superannuation, vehicles, home contents,
6. Details of liabilities - account numbers, statements, online access
7. Contract of Sale or details of potential purchase property (if known)

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