

Loan Application Checklist



NOTE: DOWNLOAD AND SAVE FORM TO YOUR DESKTOP BEFORE FILLING OUT

This form is to be used as part of your Select Home Loan mortgage application. Please submit your loan application through the Online application in MyCRM.

Introducer details

Adviser name:

Company name:

Customers name:

Application documents

Mandatory loan documents to be attached

- Signed Loan Application – (must be lodged via OLA process in MyCRM V3)
- Hand signed Declarations (dated within 30 days)
- Complete Diary notes with clear requirements and objectives
- ID for all applicants (with signatures that match declaration)
- Sale & Purchase agreement (if applicable)
- Latest income documents – (refer below)
- Trust deed (if applicable)
- Select Servicing Calculator

BANK STATEMENTS REQUIRED (PREFERABLY FROM ILLION):

- Most recent 3 months personal bank statements for all applicants
- Most recent 6 months mortgage statements on owner occupied or
- Most recent 6 months rental statements from property manager or 6 months transactional statements clearly showing rent paid (if renting)
- Most recent 6 months mortgage statements for all loans being refinanced
- Most recent statements for all debts being refinanced

Other supporting documents

- Registered valuation via Valocity
- Current council rates notice (if refinance)

NOTE: Due to COVID-19 this list is not exhaustive and we may ask for further supporting documentation.

The information in this publication is current as at 14 September 2020 and subject to change at any time. Your Select Home Loan is administered by Bluestone Servicing Limited (FSP181924), Level 5, 125 Queen Street, Auckland, 1010 New Zealand on behalf of the lender, NZGT Custodians (Bluestone) Limited (FSP40011). | lending@select.bluestone.net.nz

Income documents

Prime

FULL DOC (PAYE)

- 2 most recent payslips OR employment letter
- Any other income – provide most recent statements

FULL DOC (Self-employed)

- 6 months business bank statements AND
- 2 years full financials OR 2 years personal and company tax returns

ALT DOC (Self-employed)

- 6 months business bank statements AND EITHER
- 12 months personal and company tax returns OR Select Accountant's Letter

Near Prime

FULL DOC (PAYE)

- 2 most recent payslips OR employment letter
- Any other income - provide most recent statements

FULL DOC (Self-employed)

- 6 months business bank statements AND
- 12 months full financials OR 12 months personal and company tax returns

ALT DOC (Self-employed)

- 6 months business bank statements AND EITHER
- 6 months most recent GST returns OR Select Accountant's Letter

Specialist and Specialist +

FULL DOC (PAYE)

- 2 most recent payslips OR employment letter
- Any other income – provide most recent statements

FULL DOC (Self-employed)

- 6 months business bank statements AND
- 12 months full financials OR 12 months personal and company tax returns

ALT DOC (Self-employed)

- 6 months business bank statements AND EITHER
- 6 months most recent GST returns OR Select Accountant's Letter

SAVE FORM NOW

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