

THE

FINANCE

SPECIALISTS

Information Checklist for Home/Investment Loans

Below is a list of information required to assess your application :

Information Required

Purchase Price (Contracted or proposed) of property or current value

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Completion of Home/Investment Loan Application
(to be provided by The Finance Specialists)

First Home buyer?

Property purchased for Investment or your home?

Copies of your last three months payslips

Copy of your last years Personal tax return and Notice of Assessment

If self employed :-

- Copy of last two years tax returns (Business & Personal) & Notice's of assessment
- Interim Financials for your Business since last July 1st

Copy of Lease (for any rented properties) or details of proposed Rental income

Copy of Rates certificate for any properties owned

If refinancing, six months bank statements for your Home / Investment Loan & latest credit card statement

Identification i.e. Copy of Drivers Licence, Passport & Marriage Certificate

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