

Lender's Forms

- All forms can be located on our broker portal forms section: <https://broker.tmbank.com.au/forms>
- Applyonline will populate, within the 'Supporting documents' tab, a complete list of requirements once your application data has been captured and these application forms can be accessed via the Applyonline 'Print' function
- All requirements must be uploaded to the Applyonline application 'Supporting documents' tab.

Borrower 1 Borrower 2

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Application for Membership |
| <input type="checkbox"/> | <input type="checkbox"/> | Privacy, Consent, Declarations & Rate Lock |
| <input type="checkbox"/> | <input type="checkbox"/> | Verification of Identity |
| <input type="checkbox"/> | <input type="checkbox"/> | Broker Supplementary Commentary: Financial Position |

Income Verification

- | Borrower 1 | Borrower 2 | PAYG employee | Borrower 1 | Borrower 2 | Self-employed |
|--|--------------------------|--|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Two most recent consecutive payslips showing both applicant and employer names, ABN and YTD income. | <input type="checkbox"/> | <input type="checkbox"/> | Last two years personal and, if applicable, business Tax Returns, and |
| <i>OR at least two of the following documents.</i> | | | <input type="checkbox"/> | <input type="checkbox"/> | Current Balance Sheet and current Profit & Loss statement, and |
| <input type="checkbox"/> | <input type="checkbox"/> | Employment Contract | <input type="checkbox"/> | <input type="checkbox"/> | Latest years Tax Assessment Notice |
| <input type="checkbox"/> | <input type="checkbox"/> | Payment Summary | <input type="checkbox"/> | <input type="checkbox"/> | Investment Income/Pensions/
Government Benefits |
| <input type="checkbox"/> | <input type="checkbox"/> | Letter from employer on letterhead, not more than one month old, containing details of gross annual income, role or position, length of employment, the basis of the employment and breakdown of any salary package. | <input type="checkbox"/> | <input type="checkbox"/> | Last three months (six months for investment Income) statements, showing continuity of income type, or |
| <input type="checkbox"/> | <input type="checkbox"/> | Rental Income | <input type="checkbox"/> | <input type="checkbox"/> | Latest Investment or Dividend Statements/Pension Statements/Government Benefit Statements, or |
| <input type="checkbox"/> | <input type="checkbox"/> | Current signed tenancy agreement, or | <input type="checkbox"/> | <input type="checkbox"/> | Last two years personal tax returns. |
| <input type="checkbox"/> | <input type="checkbox"/> | Latest rental income statement from managing agent, or | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Last two years personal tax returns. | | | |

Verification of existing commitments

- | Borrower 1 | Borrower 2 | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Last three months statements of existing home loans (dated within 6 weeks of the application date). |
| <input type="checkbox"/> | <input type="checkbox"/> | Last two months statements of existing personal credit commitments (dated within 6 weeks of the application date). |

Purchasing Property

- Front Page of Contract of Sale (must show purchase price, finance date, settlement date) and any other pages relating to the price to be paid.
- Evidence of funds to complete.
- Signed letter stating that gifted funds are non-repayable (if applicable).
- Three months statements confirming genuine savings (if LVR >= 90%).
- Completed First Home Owners Grant application (if applicable).

Constructing New Property

- Copy of proposed plans and specifications.
- Copy of proposed building contract.

Refinancing/Consolidating

- Latest three months statements of existing home loans being refinanced.
- Latest two months (minimum period of 60 days) statements of other banks personal loans being refinanced/consolidated (dated within 6 weeks of the application date).
- Latest two months (minimum period of 60 days) statements of credit or store cards being refinanced/consolidated (dated within 6 weeks of the application date).