

# SMSF loan document checklist

Provide your lender with the following documents:

- A certified copy of SMSF trust deed
- A certified copy of the custodian trust deed.
- The last 2 years financial reports and income tax returns on all related entities supported by the Australian Taxation Office (ATO) Tax Agent Portal.
- Fund income tax and regulatory return.
- For newly established super funds, evidence of ability to meet stated super contributions. Eg. personal tax returns and/or payslips.
- The latest super fund statement for any fund/s you were a member of prior to the establishment of your SMSF.
- The last 2 years audited SMSF annual returns
- A letter from your [accountant](#) confirming the company trustee is not trading. You can find a template for this on our '[Accountant's Letter For A Bank](#)' page.

*Notes:*

*It's essential that you apply for an SMSF loan at least two weeks before you begin looking for a property.*

Most lenders don't understand how SMSF loans work but we do!

Call us on **1300 889 743** or complete our [free assessment form today](#).

Link to website: [SMSF Loans](#)