

## Finance Application Information:

Thank you for intrusting Crestmount Money to assist you with your home finance. We are excited to learn more about your specific financial goals and how we may be able to help you achieve them.

We understand that this process can be overwhelming at times, so we are here to provide you with the guidance and support you need to make the best decisions for you and your family.

Kindly, collate all the requested information below that is specific for your circumstances prior to our scheduled meeting so that we can ensure that the process is as straightforward and efficient as possible.

Identification	Salary / Wages	Investment Income
<ul style="list-style-type: none"> <li>• Passport</li> <li>• Driver's license</li> <li>• Medicare card</li> </ul>	<ul style="list-style-type: none"> <li>• Last 3 payslips</li> <li>• Last 3 months bank statements evidencing salary deposits</li> <li>• Last financial year ATO notice of assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Rental statements</li> <li>• Dividend statements</li> <li>• Last financial year ATO notice of assessment</li> </ul>
Company Income	Trust Income	Superannuation
<ul style="list-style-type: none"> <li>• Last 2 financial year financials and tax returns (for each company)</li> </ul>	<ul style="list-style-type: none"> <li>• Last 2 financial year financials and tax returns (for each trust)</li> </ul>	<ul style="list-style-type: none"> <li>• Last superannuation statement</li> </ul>
Existing Finance	Property Information	Notes
<ul style="list-style-type: none"> <li>• Last 3 credit card statement</li> <li>• Last 3 personal loan statement</li> <li>• Last 3 car finance statement</li> <li>• Last 3 home finance statements</li> <li>• Last 3 investment finance statements</li> </ul>	<ul style="list-style-type: none"> <li>• Last council rates notice (for each property)</li> <li>• Contract of sale (if purchasing)</li> <li>• Insurance certificate of currency</li> </ul>	