

Broker Loan Summary Sheet

Broker Name			
Broker Company Name			
Aggregator (or Direct ACL)			
State:	Mobile:	Email:	

Loan Details and Type

Loan Amount	
LVR	
Security details	
EMV/Purchase Price	
Estimated Completion Date	

- | | | |
|--------------------------------|------------------------------------|---------------------|
| Conditional Approval | Formal Approval | |
| Purchase | Refinance | Easy Refinance |
| Owner Occupied | Investment | Construction |
| SMSF - Residential | SMSF – Commercial | |
| NDIS – Construction | NDIS – Established | |
| Professional - Lender Paid LMI | Essential Worker - Lender Paid LMI | 85% Lender Paid LMI |

Borrowers	
Borrower 1	
or SMSF Corporate Trustee	
Borrower 2	
Guarantors	
Guarantor 1	
Guarantor 2	
SMSF Trust	
Bare Trust	
Corporate Bare Trustee	

Rate	P&I or IO	IO Term	Loan Term	Split Amount	Loan Purpose	Fixed Term

Written summary of application (eg, source of income, applicant background, etc)

Exceptions or “outside the box thinking” being requested (if required)