**Residential SMSF – Scenario Template**

**Security Address:**

**Description:**

**Zoning:**

**Is there an existing lease in place?**

**How will the loan be serviced lease doc, Lo doc or Full doc?**

**Security Value:**

**Existing Loan Amount/lender:**

**Loan Amount Required:**

**Loan Purpose  Refinance  Purchase**

**Provide detail:**

**Loan Term required:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Are there any credit impairments?**

**What is the current fund balance?**

**Does the client meet mandatory superannuation contributions (currently 9.25% of annual income)?**

**Can the contributions be verified consistency over a 2 year period & what frequency are contributions made:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Comments** (Has this scenario been to any other lenders, if yes provide detail):