

# Loan Application Checklist

**NOTE: DOWNLOAD AND SAVE FORM TO YOUR DESKTOP BEFORE FILLING OUT**



This form is to be used as part of your Bluestone mortgage application. After lodgement online and response from Bluestone please provide the mandatory documents outlined below and fax or email to:

**F:** 1300 133 571 **E:** [lending@bluestone.com.au](mailto:lending@bluestone.com.au)

## Commission Structure (select)

☐ Upfront (only) OR ☐ Upfront and trail

## Introducer Details

Name: Company name:

Telephone: Aggregator:

Mobile: Branch:

Email:

## Lite Blue/ Business Easy/ Crystal Blue

### Application

- ☐ Full manual or apply online application record
- ☐ Application story
- ☐ Signed Bluestone privacy consent form
- ☐ Signed Bluestone declarations form
- ☐ Completed Bluestone assets and liabilities form
- ☐ ID (clear copies) - Bluestone ID requirements form

### Refinance

- ☐ 6 months most recent mortgage statements
- ☐ 12 months most recent statements for the outstanding part 9 or 10
- ☐ 1 months most recent statements for all debts being refinanced. Crystal Blue - 6 months personal loan statements and 3 months credit card statements
- ☐ Current Council Rates notice
- ☐ Current Water Rates notice
- ☐ If Strata titled-current Levy notice

### Purchase

- ☐ Contract of sale

## Clean Slate

### Application

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- ☐ Application story
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Lite Blue/ Business Easy/ Crystal Blue	Clean Slate
<b>Income</b>	<b>Income</b>
<input type="checkbox"/> <b>3 months personal bank statements</b>	<input type="checkbox"/> <b>3 months personal bank statements</b>
<input type="checkbox"/> <b>Lite Blue</b> Latest 6 months business bank statements OR BAS (with ATO lodgement confirmation) OR Bluestone Accountants letter/declaration <input type="checkbox"/> <b>Business Easy</b> Latest 3 months business bank statements <input type="checkbox"/> <b>Crystal Blue</b> 12 months BAS AND 6 months business bank statements	<input type="checkbox"/> If PAYG – 2 most recent payslips
<input type="checkbox"/> Bluestone employment details form	<input type="checkbox"/> If self-employed – 1 year most recent individual tax returns and notice of assessments
<input type="checkbox"/> 6 months most recent rental evidence (if applicable)	<input type="checkbox"/> If self-employed - 1 year most recent company tax returns and notice of assessments
<input type="checkbox"/> Any other income – provide most recent statement	<input type="checkbox"/> If self-employed – 6 months business bank statements
	<input type="checkbox"/> 6 months most recent rental evidence (if applicable)
	<input type="checkbox"/> Any other income – provide most recent statement
<b>Other</b>	<b>Other</b>
<input type="checkbox"/> 6 months most recent rental ledger (if applicable)	<input type="checkbox"/> 6 months most recent rental ledger (if applicable)
<input type="checkbox"/> If a trust - full trust deed	<input type="checkbox"/> If a trust - full trust deed
<input type="checkbox"/> Borrower signed and completed broker mandate form (if applicable   max 2% + GST)	<input type="checkbox"/> Borrower signed and completed broker mandate form (if applicable   max 2% + GST)

By signing below, you agree that all the information that you have provided is true and correct:

#### Introducer declaration

I, \_\_\_\_\_ hereby declare that I have satisfied all of the mandatory documentation requirements and I understand that this loan application will not be approved until all Bluestone requirements, including credit decision, have been satisfied.

Introducer signature: \_\_\_\_\_

Date: \_\_\_\_\_