

Loan Application Checklist

Bluestone.

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 email to: lending@bluestone.com.au

Commission Structure

☐ Upfront only OR ☐ Upfront and trail

Introducer Details

Name:	Company name:
Telephone:	Aggregator:
Mobile:	Email:

Application Documents

Forms

- ☐ Full manual or apply online application record
- ☐ Application story
- ☐ Signed Bluestone privacy consent form
- ☐ Signed Bluestone declarations form
- ☐ Bluestone ID requirements form

Statements

All applications

- ☐ 6 months mortgage statements or 6 months rental statements for place of residence
- ☐ 3 months personal bank statements
- ☐ 12 months most recent statements for the outstanding part 9 or 10 debt agreement

Refinance

- ☐ 6 months mortgage statements for all securities offered
- ☐ For Crystal Blue: 3 months credit card statements & 1 month personal loan statements being refinanced
- ☐ For all other products: 1 month most recent statement for all debts being refinanced

Security

- ☐ Current Council Rates notice (if refinance)
- ☐ Current Water Rates notice (if refinance)
- ☐ If Strata "titled-current" Levy notice (if refinance)
- ☐ Contract of sale (if purchase)

Other

- ☐ Trust deed
- ☐ Borrower signed and completed broker mandate form (if applicable)
- ☐ Bluestone servicing calculator
- ☐ ID as per Bluestone ID requirements form

Income Documents

- ☐ 6 months most recent rental evidence (if applicable)
- ☐ Any other income - provide most recent statement
- ☐ Trust schedule (if applicable)

Clean Slate

PAYG

- ☐ 2 most recent payslips

Self-employed

- ☐ 1 yr Tax return individual & NOA PLUS
- ☐ 1 yr Tax return company PLUS
- ☐ 6 months Business Bank Statements

Crystal Blue

PAYG

- ☐ 2 most recent payslips

Self-employed Fully Verified

- ☐ 2 years Tax returns individual & NOA PLUS
- ☐ 2 years Tax returns company

Self-employed Alt - Doc

- ☐ 12 months BAS PLUS
- ☐ 6 months Business Bank Statements

Lite Blue

- ☐ 6 months Business Bank Statements OR
- ☐ 6 months BAS OR
- ☐ Accountant's Declaration

Business Easy

- ☐ 3 months Business Bank Statements

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: _____

SAVE FORM NOW