

Accountant's Letter

ALL FIELDS ON THIS FORM ARE MANDATORY.

BORROWER DETAILS

Full name:		ABN:	
Company name/Trading name:			
Business Address:			
Primary function of business:			

FINANCIAL INFORMATION

Provide current income figure(s) (not projected income)

Net Profit before tax:	\$		Director(s) Salary:	\$	
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1. Please provide an explanation of how the above has been calculated, including documents used (e.g. BAS, BBS, invoicing etc)

2. Please confirm how long you have been preparing the above businesses financials?

3. Please confirm when you last lodged tax returns for this entity

4. Explanation of why an accountants letter is being used/explain why most recent lodged returns are not provided

ACCOUNTANTS INFORMATION

Accountants name:

Company name:

Business Address:

Landline telephone number:

Tax Practitioners Board Registration Number (TPB):

Please confirm which body you are registered with:

CPA Australia

Institute of Public Accountants (IPA, formerly NIA)

Institute of Chartered Accountants Australia (ICA)

ACCOUNTANTS DECLARATION

Please tick to confirm:

I am not aware of any factors which may impact or reduce the borrower/s current income below the figures declared.

I can confirm that I'm not related to the applicant(s) and do not have any conflicts of interest in completing this declaration

This information is true to the best of my knowledge and has been confirmed from independent enquiries with our customer and our own records. I have no reason to doubt that the accounts disclose a fair picture of the client's affairs.


Accountants signature:

Date:

***Please be advised that Bluestone Mortgages will call you to discuss this letter during the assessment process.**

***Any amendments to this letter will require alternative means of income verification.**

Accountant's Letter 'How To' Guide



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4. Explanation of why an accountants letter is being used/explain why most recent lodged returns are not provided

To be completed in full by the customer's Accountant only (typed or handwritten)

Full name of all individual applicants that derive income from this entity.

One ABN per form, must be accurate and relate to the income being declared. If income is derived from a trust, the trust ABN needs to be quoted and not the trustee ABN.

One company/trust name per form. Must be accurate and relate to the income being declared, aligned to the ABN quoted.

Company's current net profit before tax (directors salary excluded).

Director's salary separate to the net profit of the business.

Detailed explanation of the information and documents used to confirm current income.

Accountant needs to have lodged at least 1 year of business financials to the ATO for this accountant letter to be valid.

Explanation to be provided that confirms why an accountant letter is being used.

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Business Address:	
Landline telephone number:	
Tax Practitioners Board Registration Number (TPB):	
Please confirm which body you are registered with: <input type="checkbox"/> CPA Australia <input type="checkbox"/> Institute of Public Accountants (IPA, formerly NIA) <input type="checkbox"/> Institute of Chartered Accountants Australia (ICA)	
ACCOUNTANTS DECLARATION	
Please tick to confirm: <input type="checkbox"/> I am not aware of any factors which may impact or reduce the borrower/s current income below the figures declared. <input type="checkbox"/> I can confirm that I'm not related to the applicant(s) and do not have any conflicts of interest in completing this declaration <input type="checkbox"/> This information is true to the best of my knowledge and has been confirmed from independent enquiries with our customer and our own records. I have no reason to doubt that the accounts disclose a fair picture of the client's affairs	
Accountants signature	
*Please be advised that Bluestone Mortgages will call you to discuss this letter during the assessment process. *Any amendments to this letter will require alternative means of income verification.	

Accountants details need to be accurate and will be verified via independent sources.

Tax practitioner board number for the Accountant must be provided and registered. This will be verified via the TPB website.

Declarations must be selected for the accountant declaration to be acceptable.

Accountant to sign and date, with a wet signature only. Electronic signatures are not acceptable.

IMPORTANT: We cannot accept an amended accountants letter to verify income.

All information on the accountants letter must be completed in full, accurate and matching the customers declaration when submitted to Bluestone. Other income verification will need to be provided if there are any errors or missing information on the form.