

# Gym Mortgage Documentation Checklist

Client: \_\_\_\_\_

Required Prior  
to Quote      Required Prior  
to Approval

## Purchase

Contract of Sale (signed by both vendor & purchaser) . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Receipt for paid deposit. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Copies of marketing collateral provided by vendor. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Completed funds required worksheet. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Copy of liquor license/transfer documents. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
3 years tax returns/financial statements (business being purchased). . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Business Plan. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
12 – 36 month proposed financial projections. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Copy of certificate of incorporation. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Schedule of equipment (make, model, year etc) included in the purchase. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Copy of vendor’s most recent depreciation schedule. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
List of lease/loan obligations included in the purchase. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Evidence of sufficient funds to complete purchase. . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## Refinance

Past 12 months loan statements. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Signed outgoing lender discharge authority. . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## General Documents

Completed & signed Podium Hospitality application form. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Signed Podium Hospitality quote acceptance. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Signed lender application form/declarations. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
100 points ID (clear scanned copies). . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Resume highlighting relevant industry experience. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Copy of trust deed/s. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Detailed letter of explanation (if, past credit issues). . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## Income Documents: Self-Employed

Past 2 years individual tax returns. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Most recent Notice of Assessment. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Past 2 years business tax returns/financial statements. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Recent ATO portal print out showing taxes up to date. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Past 6 months bank statement (main trading account). . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## PAYG

Latest 2 payslips. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Letter of Employment. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
2014 Group Certificate. . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## Rental Properties

Copy of lease/lease schedule. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Most recent managing agent rental statement. . . . .	<input type="checkbox"/>	<input type="checkbox"/>