

Before your first chat, *gather these.*



A short list to get us started. Have these ready and we can give you a clear picture of where you stand from the very first conversation.

This list is for our initial chat only. Once we know which lender suits you best and you decide to go ahead, we may need a few extra documents. Every lender asks for something slightly different, and we'll tell you exactly what and why.

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Photo ID

Driver's licence and Medicare card

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Payslips

Your two most recent

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Savings & transaction accounts

Three months' statements, all accounts

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Home loan

Three months' statements for any existing home loan

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Loans

Three months' statements — personal, car or any other loan

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Credit cards

Three months' statements, all cards

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Buy now pay later

Three months' statements — Zip, Afterpay and the like

Self-employed? We'll talk you through what's needed — it's usually your last two years' tax returns and financials, and we can work out the rest together.