

# 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.net.nz](mailto:lending@bluestone.net.nz)

## Introducer details

Advisor name:

Company name:

Customers name:

## Application documents

### Mandatory loan documents to be attached

Signed Loan Application (electronically completed)

Hand signed Declarations (dated within 30 days)

Complete Diary notes with clear requirements and objectives

ID for all applicants (with signatures that match declaration)

Most recent 3 months personal bank statements for all applicants

Most recent 6 months mortgage statements on O/Occ or

Most recent 6 months rental statements from property manager (if renting)

Most recent 6 months mortgage statements for all loans being refinanced

Last 3 months statements on all debts being refinanced (unless Specialist only most recent statement required)

Bluestone Servicing Calculator

Purchase / Sale agreement (if applicable)

Latest income documents – (refer below)

Trust deed (if applicable)

### Other supporting documents

Registered valuation via Valocity

Current council rates notice (if refinance)

Address verification (utility / phone bill)

## Income documents

### Prime

#### FULL DOC (PAYE)

2 most recent payslips

Any other income – provide most recent statements

#### FULL DOC (Self-employed)

6 months business bank statements AND

2 years full financials OR 2 years personal and company tax returns with SOE

#### ALT DOC (Self-employed)

6 months business bank statements AND

12 months personal and company tax returns OR Bluestone Accountants letter with a P&L

### Near Prime

#### FULL DOC (PAYE)

2 most recent payslips

Any other income - provide most recent statements

#### FULL DOC (Self-employed)

6 months business bank statements AND

12 months full financials OR 12 months personal and company tax returns

#### ALT DOC (Self-employed)

6 months business bank statements AND

Bluestone Accountants letter OR 6 months GST returns

### Specialist and Specialist +

#### FULL DOC (PAYE)

2 most recent payslips

Any other income – provide most recent statements

#### FULL DOC (Self-employed)

6 months business bank statements AND

12 months full financials OR 12 months personal and company tax returns

#### ALT DOC (Self-employed)

6 months business bank statements AND

Bluestone Accountants letter OR 6 months most recent GST returns

**SAVE FORM NOW**