

SMSF – LOANAPP LODGEMENT

Create your Application

Create Application

Application Name
BJC Super Fund

Lender
Allstate HOME LOANS

Product Group
 Standard Residential Mortgages DEV
 Standard Residential Mortgages

Documentation Type
 Full Doc
 Lo Doc

Loan Writer
Search...

Ali Taylor Antony Avner Bryce Cameron Chris Christina Dave Elizabeth
Eide Jay Ellis John Kate Khai Singh Jander Lennart Leda Mera

Open the Application after it has been created

Create Cancel

These fields are required

The application form that opens up will look the same as a regular LoanApp lodgement.

This guide will assist in making sense of structure, by the order we complete Loan App.

CURRENT SITUATION

The screenshot shows a navigation menu with the following items:

- FILE
- PRECUSOR
- CURRENT SITUATION** (highlighted with a red border)
- NEW REQUIREMENTS
- SUMMARY

Under the 'CURRENT SITUATION' menu, there are three main categories of sub-items:

- Borrowers and Guarantors:** Person Applicants, Company Applicants, Trust Applicants.
- Assets and Liabilities:** Existing Properties, Other Assets, Mortgage Liabilities, Other Liabilities.
- Other Sources of Income:** Other Income.

1. Load **Trust Applicants first** – as this is the primary party for any SMSF Application
2. **Company Applicants second** – as they are the Trustees, and
3. **Person Applicants last** – as these are your guarantors

1. TRUST APPLICANTS

The screenshot displays the Allstate HomeLoans application interface. At the top, a navigation bar includes tabs for FILE, PRECURSOR, CURRENT SITUATION, NEW REQUIREMENTS, and SUMMARY. The CURRENT SITUATION tab is active. Below the navigation bar, there are several categories of data entry: Borrowers and Guarantors (Person Applicants, Company Applicants, Trust Applicants), Assets and Liabilities (Existing Properties, Other Assets, Mortgage Liabilities, Other Liabilities), and Other Sources of Income (Other Income). The Trust Applicants category is highlighted with a red box. On the right side, the application title is 'SMSF Test Ocean Diamond SMSF - APP-GVDZ6T' and the version is 'Standard Residential Mortgages DEV v1.0.368'. The Allstate HomeLoans logo is also present. The main content area is divided into three sections: a left sidebar, a central 'Trust Applicants' section, and a right 'Trust Applicants List' section. The left sidebar shows a tree view of the application structure, with 'Trust Applicants' expanded to show two trusts: 'Trust - BJC Super Fund' and 'Trust - Billy J Property Fund'. The central section has a large 'Add Trust Applicant' button and the text 'Add Trust data relevant to this application.' The right section shows a list of the two trusts, each with a 'Set Up For 0 Years' and 'Established in AU' status, and a trash icon. A red box labeled '1' is next to the 'Trust Applicants' category in the sidebar, and another red box labeled '2' is next to the 'Trust - Billy J Property Fund' item.

Select Trust Applicants and then follow through the page menu on the left to complete all the required data.

You will create a two Trust Applicants:

1. SMSF Trust
2. Security Trust (better known as the Bare Trust)

COMPANY APPLICANTS

FILE PRECURSOR CURRENT SITUATION NEW REQUIREMENTS SUMMARY Add Info Request Change Request Veronica Cook ?

Person Applicants **Company Applicants** Trust Applicants Existing Properties Other Assets Mortgage Liabilities Other Liabilities Other Income

Borrowers and Guarantors Assets and Liabilities Other Sources of Income

SMSF Test Ocean Diamond SMSF - APP-GVDZ6T Standard Residential Mortgages DEV v1.0.368 Allstate HOMELOANS

2

Company Applicants

Billy J ATF Billy J Property Fund (Guarantor)

- Contact Details
- Business Details
- Year To Date Income
- 01/07/2021 - 30/06/2022
- 01/07/2020 - 30/06/2021

BILLY J Cyrus ATF BJC Super Fund (Borrower)

- Contact Details
- Business Details
- Year To Date Income
- 01/07/2021 - 30/06/2022
- 01/07/2020 - 30/06/2021

1

Company Applicants

Add Company Applicant Add Company Applicants

Add all company applicants that are either borrowers or guarantors to this application.

Company Applicants List 1 Message

Billy J ATF Billy J Property Fund (Guarantor)	Registered on 01/07/2022	0 Years in Business	Guarantor
BILLY J Cyrus ATF BJC Super Fund (Borrower)	Registered on 11/11/2021	1 Years in Business	Secondary Applicant

Select **Company Applicants** to add your borrower. Follow through the page menu on the left to complete all the required data.

You are required to have a Corporate trustee for each trust

PERSONAL APPLICANTS

FILE PRECURSOR CURRENT SITUATION NEW REQUIREMENTS SUMMARY Add Info Request Change Request Veronica Cook

Person Applicants Company Applicants Trust Applicants Existing Properties Other Assets Mortgage Liabilities Other Liabilities Other Income

Borrowers and Guarantors Assets and Liabilities Other Sources of Income

SMSF Test Ocean Diamond SMSF - APP-GVDZ6T Standard Residential Mortgages DEV v1.0.368 Allstate HOMELOANS

Person Applicants Mr Billy Cyrus (Guarantor) Contact Details Other Details Employment PAYG - Primary, Full Time Proof Of Identity Photographic - Australian Drivers Lic Photographic - Australian Passport Miss Miley Cyrus (Guarantor) Contact Details Other Details Employment PAYG - Primary, Full Time Proof Of Identity Photographic - Australian Drivers Lic Photographic - Australian Passport

Document 0 Messages

Document Type	Australian Passport	Original Sighted	Yes
Document Category	Photographic	Name Verified	
Name On Document	Miley Cyrus	Photograph Verified	
Document Number	36998	DOB Verified	
Date Of Issue	3/01/2022	Signature Verified	
Expiry Date	3/01/2027	Location Document Verified	24 Compass Court, Clevelan...
Country Of Issue	Australia	Date Document Verified	30/01/2023
Place Of Issue			

Select **Personal Applicants** to add your guarantors, also follow through the page menu on the left to complete all the required data.

This is where you will load all individual Guarantors.

OTHER REQUIREMENTS

In this section you need to specify the purchase property and apportion ownership to the correct entity

The screenshot displays a software interface for mortgage applications. The top navigation bar includes 'FILE', 'PRECURSOR', 'CURRENT SITUATION', 'NEW REQUIREMENTS', and 'SUMMARY'. Below this is a secondary navigation bar with icons for 'Person Applicants', 'Company Applicants', 'Trust Applicants', 'Existing Properties', 'Other Assets', 'Mortgage Liabilities', 'Other Liabilities', and 'Other Income'. The 'Existing Properties' icon is highlighted with a red box. The main content area is divided into three sections: 'Existing Properties' (with an 'Add Property Asset' button), 'Property Assets List' (showing 'No Existing Properties added in the application'), and a 'Messages' section with '0 Messages'.

Complete this area for the SMSF, Existing Properties, Other Assets, Mortgages, Other Income.....as required.

NEW REQUIREMENTS

The screenshot displays a software interface for 'NEW REQUIREMENTS'. The top navigation bar includes 'FILE', 'PRECURSOR', 'CURRENT SITUATION', 'NEW REQUIREMENTS' (highlighted with a red box), and 'SUMMARY'. Below this, a secondary menu shows 'New Purchase' (highlighted with a red box), 'New Loans', 'Contribution Funds', and 'Lending Guarantee'. The main content area is titled 'New Property' and shows details for a residential property at '24 Compass Court, Cleveland QLD 4163'. The 'Ownership Proportions' section is highlighted with a red box and lists six owners with their respective ownership percentages.

Owner (s)	Ownership Percentage
Mr Billy Cyrus (Guarantor)	0.00 %
Miss Miley Cyrus (Guarantor)	0.00 %
Billy J ATF Billy J Property Fund (Guarantor)	0.00 %
BILLY J Cyrus ATF BJC Super Fund (Borrower)	0.00 %
Trust - BJC Super Fund	0.00 %
Trust - Billy J Property Fund	100.00 %

Allocate 100% Ownership of the property to the BARE TRUST

New Purchase
New Real Estate

New Loans
Loan Accounts

Contribution Funds
Funds To Complete

Lending Guarantee
Guarantee

Loan Accounts

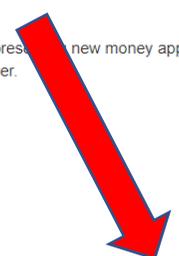
Ocean Diamond SMSF Variable Full Doc

Loan Accounts

Add Loan Account

Add Loan Accounts

Add loan accounts representing new money applied for with this application to this lender.



Loan Accounts List

0 Messages

Ocean Diamond SMSF Variable Full Doc INV P&I	Amount - \$1,040,000.00 30 Years 6.79%	
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Loan Accounts x

Create Loan Accounts Advanced Search

Cabernet
Green
Ocean
Orange +
Purple +
RedZed +

Expand all Collapse all

Add Loan Account Cancel

Select Lender and Product as required

STATEMENT OF POSITION

Summary Data Statement Of Position Application Comment
Application Summary

SMSF Test Ocean Diamond SMSF - APP-GVDZ6T
Standard Residential Mortgages DEV v1.0.368



- Statement Of Position
- Billy Cyrus (Guarantor) , Miley Cyrus (Guarantor)

Statement Of Position



Add Statement Of Position

Add Statement Of Position details for all applicants in this loan application. This section ensures that all Assets, Liabilities, Income and Expenses are grouped correctly in the Print Form. For each Statement of Position you create, please select which Applicants should be grouped together.

Statement Of Position List

1 Message

Billy Cyrus (Guarantor) , Miley Cyrus (Guarantor) [trash icon]

