Your streamlined SMSF journey with the AMP Broker Platform

Faster. Smarter. Built for SMSF brokers and members.

Pre-submission

1. **Pick AMP Bank's SMSF lender: SuperEdge**
   Ideal for SMSF property investment under LRBA. Offset deposit account available; refinance only.
2. **Launch from your CRM straight into Loanapp**
   No rekeying-begin with serviceability check, then upgrade to full application with one click.
3. **Send digital consent and complete VOI**
   Applicants provide consent; VOI uses DVS checks. Add SMSF participants and prepare IDs for guarantor directors.
4. **Set up the SMSF loan structure in Loanapp**
   SMSF Trust as primary borrower, SMSF corporate trustee as coborrower, and all other parties are guarantors. Ensures correct legal flow.
5. **Verify SMSF income and expenses**
   Check contributions, rental income via Cotality Rental AVM, and input applicable SMSF operating expenses. Use AMP SMSF Calculator at pre-assessment.
6. **Credit policy rules-surface early, submit cleaner**
   Only investment purpose, no cashout, correct LRBA and offset use, and proper documents required. Reduces later rework.

Assessment

7. **Submit the application**
   Clean, verified LRBA structure minimises back and forth.
8. **Credit team reviews only validated data**
   If structure, serviceability, assets, and documents pass, approval is quick.
9. **Fast approval**
   If documents are missing, you'll be notified promptly to resolve quickly.

Settlement

10. **Loan docs issued fast via MSA**
    MSA handles deed vetting and coordinates with client's solicitor for legal documents.
11. **MSA manages all settlement logistics**
    Including discharge and LRBA steps. You focus on your next client.

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