

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; purchase or 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.