

Meet Louie & Marco

Brothers, growing their nest-egg together



Residential SMSF

Age: Louie (46), Marco (51)

Occupation: Louie (Retail) and Marco (Electrician)

Location: Epping, NSW (Metro)

Loan Required: \$572,000

LVR: 80%

Product: Residential SMSF

As with all La Trobe Financial products, there is no clawback on broker commissions.



By applying together, we had so many more property options available.

Louie and his older brother Marco have always been close. First generation Australians, they both married in the same summer, keen fishermen and above else, proud fathers.

They've both worked hard for their money, just as their parents taught them. Now, they've established a Self-managed Superannuation Fund (SMSF) to put their money to work.

Residential SMSF

By consolidating their industry superannuation funds into one SMSF, Louie and Marco assembled a little over \$400,000 to invest. Louie and Marco wanted to invest in property as it is an asset they know and trust and their financial adviser supported this strategy.

The brothers found a suitable property in Epping, NSW – an established suburb, a short drive or bus ride from Macquarie University – available to buy for \$715,000. Louie and Marco approached their broker to assist in finding a suitable lender to support their borrowing requirements.

The Solution

La Trobe Financial approved a SMSF loan for \$572,000, being 80% of the property value, meaning the SMSF only had to contribute the remaining \$143,000 plus costs and duties, leaving the brothers with more than \$200,000 in their SMSF for future investments.

Talk to your **Senior Manager Client Partnership** or alternatively the **Scenarios Team** on **13 80 10**

[Submit Scenario](#)

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The Target Market Determination for this product is available on our website.

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