

Loan Checklist

- Last two years W-2's/1099's _____
- Last two years personal tax returns (all schedules please) _____
- Last two years business tax returns (if \geq 25% owned) _____
- Thirty days current pay stubs
- Two months most current statements for all accounts (all pages)
- 401K and/or Retirement Statements (most current, all pages)
- Home Owners Insurance Agent name & number or declaration page of policy
- Copy of Mortgage Statement
- Color copy of Driver's License (front & back)
- Copy of Permanent Resident Alien Card(s) (if applicable)
- Divorce Decree (if applicable)
- Parenting Agreement (if applicable)
- Bankruptcy papers and Discharge Notice (if applicable)
- Rental Agreement
- _____
- _____
- _____

VA Loans

- Copy of DD214 (VA Loan)
- Certificate of Eligibility (VA Loan)

If Retired

- Social Security Award Letter
- Pension Award Letter
- Last two years 1099's

Forms Required

- Borrowers Authorization (enclosed)
- 4506T (enclosed)
- E-Sign Disclosure (enclosed)

Please submit all documents & forms asap. Any applicable items missing will delay the process of your loan being submitted. Thank you in advance for your timely assistance.



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