



DOCUMENTS CHECKLIST

Below is a list of documents that will be needed to process your loan application. Having these documents ready to go will make the application process more efficient. Additional items may be requested later in the process.

Income

- Previous two years W-2s
- Most recent pay stubs covering 30 days
- Last two years personal tax returns (all schedules)
- Last two years business tax returns
- Social Security Award Letter
- Pension Award Letter
- Previous two years 1099s
- Rental agreements for all properties owned

Assets

- Most recent investment statements covering 60 days
- Most recent bank statements covering 60 days (all accounts and all pages)

Other

- Copy of photo identification
- Copy of Social Security card(s)
- Purchase and Sale Agreement
- Homeowner's Insurance Agent/Company name and phone number
- Copy of most recent Mortgage Statement
- Copy of Mortgage Note
- Copy of Permanent Resident Alien Card(s)
- Divorce Decree
- Child Support Order
- Bankruptcy papers and Discharge Notice
- Copy of DD214 (VA Loans)
- Certificate of Eligibility (VA Loans)
- Homeowner's Association contact information

