



In order to speed up the process of your request, please provide the following:

1. Completed loan application package.

- a. Application completed and signed (e-signed) by all applicants. ____
- b. Copy of sales contract if this is a purchase transaction. ____
- c. Copy of driver's license by all applicants. ____

2. Documentation for income for each applicant.

- a. Copy of most recent paycheck stub. ____
- b. Copies of last 2 years W-2's. ____
- c. Copies of completed Federal Tax Returns for past 2 year (including all supporting schedules). ____

3. Documentation of funds to close.

- a. Copies of most recent 2 months bank statements (all pages).
Checking ____ Savings ____ Money Market ____

4. Documentation of investments/assets.

- a. Current statements for 401K, stock brokerage, or retirement accounts. ____

5. Service preferences.

- a. Who is your Homeowner's Insurance Company?

Company _____

Agent _____

- b. For purchases provide a quote, for refinance provide a current copy of policy. ____

6. If applicable, compete divorce decree or discharged bankruptcy papers, along with letter of explanation for filing bankruptcy. ____

REFINANCE:

- a. A copy of your mortgage statement from your current mortgage company(s). ____

If you cannot immediately provide some of the items listed above, please do not delay turning in the application. The items can be turned in separately. Please note, the underwriter may require additional items.

Please call Bill Holt at (850) 481-8085 with any questions or concerns you may have.