



REQUIRED DOCUMENTS CHECKLIST

THANK YOU for your interest in obtaining a real estate loan.

In order to complete your application, please provide the following items for ALL borrowers. NOTE: Not all documents may apply. If something is not applicable, please disregard.

- 2 Most Recent W2s and/or 1099's
- Paystubs Covering One (1) Full Month
- 2 Most Recent Bank Statements - all pages, including blank/disclosure pages
- Clear Copy of Drivers' License/Photo ID
- Clear Copy of Resident Alien Card - if applicable

IF YOU CURRENTLY OWN ANY HOME:

- Most Recent Mortgage Statement for ALL owned properties
- Most Recent Homeowners Insurance Dec Page for ALL owned properties to verify coverage and annual premium
- Most Recent Homeowners Association Statement for ALL owned properties to verify monthly or annual dues

IF SELF-EMPLOYED (or If You Own Multiple Properties):

- YTD Profit and Loss Statement - Signed and Dated
- YTD Balance Sheet - Signed and Dated
- 2 Most Recent Personal and Business Federal Tax Returns, including all pages, schedules, and statements
- 2 Most Recent K1 statements - if applicable

IF RETIRED:

- Most Recent Social Security/Pension Award Letter

IF MILITARY VETERAN:

- Certificate of Release or Discharge from Active Duty (Form DD214)

Your Mortgage Advisor will provide you with an online link to submit your loan application and access our secure portal to upload your documents.



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