

# Document Check List



1. Application and signed borrowers authorization form attached
2. 2023 & 2024 W2's and Taxes. If you receive 1099's please send those as well
3. Current paycheck stubs - One FULL month (if you are paid weekly we will need 4 stubs)
4. Copy of driver's license and social security card
5. For a refinance: Past 2 months bank statements (All pages even if they are blank)
6. For a purchase: Past 2 months bank statements showing the down payment (All pages even if they are blank)
7. Most recent statement of any retirement accounts: 401K, IRA, Mutual Funds etc.
8. Proof of pension or retirement income
9. If you receive social security or permanent disability income please provide award letter
10. If you currently own any properties please send all mortgage statements, 1st page of the insurance and HOA information

## Self Employment Check List

As it applies above, please send all required documentation

2. 2023 & 2024 business tax returns
3. K1's if applicable
4. 2023 & 2024 1099's
5. 2024 Profit & Loss and balance sheet

## Other Items If Applicable

1. VA Loan DD214
2. Divorce decree from court showing alimony or child support amount
3. IRS payment plan for back taxes
4. Bankruptcy discharge paperwork