

# LOAN PACKAGE CHECKLIST

*For home purchase or refinance*



Copy of Driver's License &  
Social Security Card

Last 30 Days Pay Check Stubs OR  
Social Security/Pension Awards Letter

2 Years Most Recent W2's &  
1099's

Self-Employed: Provide A Copy of Your  
Business License OR CPA Letter, 2 Years  
Most Recent Business Tax Returns

2 Years Most Recent Tax Returns  
(All Schedules, All Pages)

If you own a home(s): Provide A Copy of  
Your Most Recent Mortgage Statement(s),  
Homeowner's Insurance Dec Page & HOA  
Statement (If Applicable)

2 Months Most Recent Bank  
Statements (All Pages Even If  
Blank)

Now that you've completed your loan application, we're ready to collect your documents. Please use this checklist to provide all documents applicable to you. Once all documents are received, I'll begin to review your file and hammer out the details. Based on my review additional items may be needed.

My goal is to make sure you're comfortable from start to finish. So, if you have any questions please call or email me, I'm here to help!

(805)807-4049  
[Bruno@brunohomeloans.com](mailto:Bruno@brunohomeloans.com)

