

Hi **Conventional Borrower**,

You will receive an invitation to SmartVault, our secure document management portal. Please upload your documents to this portal.

**Please note, due to the high volume of loans we have an extremely busy workload. We cannot move forward with your loan until we have all of your documents.**

Documents Needed For Your Loan:

<input type="checkbox"/>	Paystubs	Your most recent 30-day Paystubs.
<input type="checkbox"/>	Tax Returns	We need your last 2-Years of personal Tax Returns. (All schedules of Federal return only).
<input type="checkbox"/>	W-2 Forms	2023 and 2024 W-2 Forms.
<input type="checkbox"/>	Bank Statements	Your most recent 60-day Bank Statements for all accounts. Please include <b>ALL PAGES</b> that are numbered, even if they are blank.
<input type="checkbox"/>	Earnest Money	Updated Transaction History to show earnest money clearing your bank account from date of last statement thru the date the money cleared your account. (When funds have cleared).
<input type="checkbox"/>	Purchase & Sale Contract	Copy of the Purchase & Sale Agreement for your home that you are selling/buying – signed by all parties.
<input type="checkbox"/>	401(K) or Retirement Acct.	Your most recent 60-day Statement from any 401K or Retirement Account as well as terms and conditions of withdrawal (on the website or through customer service from 401K).
<input type="checkbox"/>	Mortgage Statement	Your current Mortgage Statements of all properties you own.
<input type="checkbox"/>	Hazard Insurance	Your Hazard Insurance Premium for all properties you own (or the insurance agent contact information).
<input type="checkbox"/>	New Hazard Insurance	New Hazard Insurance Policy for the home that you are purchasing. I will need the contact information for the insurance agent that you are using and can get everything that I need from them once you approve the policy premium. Please give them permission to talk with me.
<input type="checkbox"/>	ID	Your government issued ID - Driver's License, Social Security Card and or Passport.
<input type="checkbox"/>	Credit Card Authorization	The Credit Card Authorization Form is in your SmartVault portal. This form is needed to schedule your appraisal, if needed, in a timely manner. Please fill and sign this form

Thank you so much for the opportunity to work on your loan. I am here if you have any questions.



*Tanya Cohn*

Best Wishes, Warmest Regards  
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