

DOCUMENT CHECKLIST

PURCHASE PRICE \$ _____	DOWN PAYMENT \$ _____	LOAN AMOUNT \$ _____
SELLING AGENT PHONE & EMAIL		
PROPERTY ADDRESS		
BORROWER NAME		
BORROWER PHONE & EMAIL		
CO-BORROWER		
CO-BORROWER PHONE & EMAIL		

Borrower's Personal Info

- Driver's License and Social Security Card

Asset Documents

- 2 months Bank Statements
- Retirement Plan / 401 K Statements
- Stock / Bond

Income Documents:

- 2 years Personal Tax Returns
- 2 years Business Tax Returns
- 2 years W-2
- 2 years 1099
- 2 most Recent Pay Stubs
- Business License or CPA letter verifying 2 years of Business and % of Ownership

Property Documents for All Properties

- All Properties Own: _____
- Mortgage Statement
- Property Tax Bills
- Insurance Premium, Insurance Agent's Contact Info _____
- HO6 Insurance Premium, Insurance Agent's Contact Info _____
- HOA Statement HOA Fee \$ _____ HOA Contact _____

New Loan

- Purchase Rate/Term Cash Out
- Term: 30 years 15 years 10 years 7 years 5 years 3 years Interest : _____%
- Impounds
- Taxes **AND/OR** Insurance

FHA

- Note for FHA Case Number:
- Prior Submission: _____ Date: _____