



Important to send all the applicable information on the checklist within 24 hours of when you completed your application. This will make the mortgage loan process smoother for you and will ensure a solid loan approval.

PERSONAL INFORMATION:

- Photo ID:** Driver's license, State ID, Passport, or Military ID
- Social Security Number OR ITIN Card**
- Permanent Resident Alien Card/Visa** (front and back)
- Veterans ONLY: DD-214 and COE** (Certification of Eligibility)

FINANCIAL INFORMATION:

- Paystubs:** Last 30 days
- Bank Statements:** Last 2 months
- Verification of Employment:** Contact Person & number or HR information
- W-2's & Tax Returns**(all pages): Last 2 years
- Retirement Accounts:** 401k's, IRA's, SEPs, CD's, etc. (Terms and conditions of withdraw may also apply)

Self-Employment Documentation:

- 1099's:** Last 2 years
- Business Tax Returns:** K-1's, corporate and/or partnership returns(all pages)
Last 2 years

IF APPLICABLE, INCLUDE:

- Award Letter(s):** Social Security, VA benefits, Pension (Award) Letter
- Divorce Decree and/or Child Support order:** Required if using or paying alimony-child support income
- Brokerage Accounts:** showing stocks, bonds, fund investments
- Academic Transcript or Diploma** (If borrower was a student in the last 2 years)
- Gift Fund Letter:** If, borrower has a donor gifting funds towards down payment or closing cost.

OTHER PROPERTIES OWNED:

- If property is leased out:** Proof of Rental Agreement and Rental Payments
- Survey**
- Latest Mortgage Statement**