



## How To Document a Retirement Withdrawal

Are you doing a retirement or investment withdrawal to use for your closing? Here are the documents you will need to provide!

- Most recent official quarterly retirement or investment account statement
- Print out of the retirement or investment account statement to show the funds being withdrawn
- Copy of the withdrawal check (unless it is being direct deposited)
- Copy of your most recent official bank statement, and signed/stamped print out from the ending date though the date that the retirement/investment money is deposited to show the new balance that will be used for closing
- If the withdrawal is taken as a loan, we will need a copy of the terms of repayment

Thank you!