



LOAN DOCUMENT

checklist

PROOF OF ID FROM (ONE OF THE FOLLOWING)

- Driver's License State ID Card Passport Military's ID Card
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PROOF OF INCOME

- Most Recent Paystub Two Years of W-2 Forms
 2 Months of Bank Statement for All Checking & Saving Accounts
 Year-to-date Profit and Loss Statement Last Two Year of Tax Returns (only if Self-Employed)
 2 Years of Income Tax Return (Typically Form 1099) (*only if Self-Employed*)
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2 MONTHS OF STATEMENTS FOR ALL INVESTMENT ACCOUNTS INCLUDING:

- Retirement Accounts (401(k)s, IRAs, SEPs, etc) CDs
 Brokerage Accounts (Showing Stocks, Bonds, and Fund Investments)
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IF YOU HAVE INCOME FROM A RENTAL PROPERTY

- The Most Recent Appraisal Proof of Receiving Rental Payment
 Proof of Property Debt and Expenses
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DOCUMENTATION OF OTHER ONGOING EXPENSES, SUCH AS:

- Alimony
 Child Support
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OTHER, IF APPLICABLE

- ACCUMULATED CASH VALUE FROM LIFE INSURANCE, IF APPLICABLE DOWNPAYMENT GIFT LETTERS, IF APPLICABLE ALIMONY AND CHILD SUPPORT, IF APPLICABLE
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**PLEASE REACH OUT IF YOU HAVE ANY QUESTIONS,
I AM ALWAYS HERE TO HELP!**