



Loan Application Checklist

Please bring the following items with you for your next appointment

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| General | |
| Photo ID and proof of Social Security Number | |
| Residence addresses for the past 2 years | |
| Income and Assets: | |
| Statements for each bank, mutual fund, and/or investment account for the last 3 months | |
| If you have made large deposits to your account: | |
| Explanation and source of deposit | |
| If large deposit was gift: | |
| Signed gift letter | |
| Copy of gift check | |
| Copy of deposit receipt | |
| Wages: | |
| Pay stubs for the last 30 days | |
| Names and address of employer for last 2 years | |
| W-2's for last 2 years | |
| Tax returns for last 2 years | |
| If you are self-employed: | |
| Tax returns for the last 3 years (with schedules) | |
| Year-to-date Profit and Loss Statement | |
| 1099 | |
| If you own rental property: | |
| Tax returns for the last 2 years and current rental agreements | |
| If you are retired: | |
| Pension award letter | |
| If you received Social Security: | |
| Social Security award letter | |
| If you are counting child support as income: | |
| Copy of divorce settlement and 12months cancelled child support checks | |
| Estimated value of personal property and furniture | |
| Debts: | |
| Names, address, account numbers, balances, and monthly payments on all current loans | |
| Property information: | |
| Purchase agreement, copy of legal description and MLS Sheet | |
| If you are selling your current home, a copy of the listing contract | |
| If you have sold your property, a copy of the settlement statement (HUD-1) | |
| Current mortgage statement | |
| Current declaration page of Insurance statement | |

