



Loan Document Checklist:

- Mortgage Statements for all mortgages owed (if applicable)
- Property Tax Bill for each property owned (if applicable)
- Insurance Dec Page showing annual premium for each property owned (if applicable)
- 2 Years complete Federal Tax Returns with all schedules
- 2 Years complete Corporate Tax Returns with all schedules and K-1's (if applicable)
- Copy of Business License (if self-employed)
- 2 Years W-2's & 1099's
- Social Security & Pension Award Letter (if applicable)
- 1 month worth of paystubs - current (if you get paystubs – if self employed not needed)
- 2 months bank statements (all pages) for all accounts
- Drivers License – legible copy
- Social Security card – legible copy
- Borrower's Authorization
- Credit Card Authorization

Additional documents for Purchase Transaction:

- Fully Executed Purchase Contract
- Escrow & Title Information
- HOA information
- Insurance agent information to order Hazard Insurance