

DOCUMENTS REQUESTED LIST



- W2 forms for the last two years**
(Current and/or past employer(s))
- Personal tax returns for the last two years**
(Including all pages and all schedules, with your signature at the bottom of Page 2 of each return)
- Corporate tax returns for the past two years (if you're self-employed)**
(Including all pages, schedules and K-1s)
- Current paystubs covering a full 30-day period**
(Review to ensure they include a year-to-date history)
- Bank statements for all accounts from the last two months, including all pages, even if they're blank**
(We cannot use online bank print outs or screenshots)
- 401K and/or retirement statements**
(Most current statements, all pages)
- Insurance declaration page, including homeowners insurance agent name and phone number**
- Copy of Mortgage Statement(s) for all properties owned**
(Most current statements, all pages)
- Copy of drivers license**
(A picture from your smartphone is fine)
- Lease Agreements for all investment properties**
- Copy of Permanent Resident Alien Card(s)**
(If you're not a U.S. citizen)
- Divorce Decree**
- Child Support order**
- Bankruptcy papers and discharge notice**

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RETIRED BORROWERS

- Social Security award letter**
- Pension award letter**
- 1099 documents for the last two years**

VA LOANS

- Certificate of Eligibility**

Please submit all documents and forms via email or fax as soon as possible. Any missing items will delay the process. **Thank you in advance!**

LET'S CHAT!

Our loan advisors are available days and evenings at your convenience.



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