



Checklist

Listed below are items needed to expedite the processing of your home loan. Please return the checked items at your earliest convenience. Thank you.

- Last 2 Years of W-2's
- Last 2 Years of 1099's
- Last 2 years of Federal Tax Returns (if they are completed).
If you don't have the latest Returns done yet, at least send your prior year W-2's
- Last 2 years of Federal Corporate Income Tax Returns
- Last 2 years of K-1's (if more than 25% owner we will need last two years
Federal Partnership returns)
- Year to date Profit and Loss Statement
- Most recent, last 3 paycheck stubs
- Other: _____
- Most recent, last 2 months bank statements, all accounts, all pages
- Other: Assets and Stock statements, 2 months, all accounts, all pages
- Copy of rental agreements for all rental properties
- Copy of mortgage payment coupon(s) for all properties
- Copy of Homeowners Insurance Policy, subject property
- Name/Phone Number of Homeowners Association if property is a condo
- Please list your landlord's name and address. We will need to mail a verification of rental history
- You will need to be prepared to pay the appraiser at the time of the appraisal
- Copy of identification - drivers license or passport