

LOAN CHECKLIST



IDENTITY & CONTACT INFO

- Driver's license/ government-issued photo identification
- Two-year residency history
- Social security card
- Buyer and seller real estate agent contact information



INCOME & TAX DOCUMENTS

- Last two months bank statements for all financial accounts
- Last 30 days pay stubs
- Last two years W-2's & federal tax returns
- Loan payment information (car, boat, RV, etc.)



HOME PURCHASE DOCUMENTS

- Purchase agreement
- Earnest money deposit receipt
- Buyer & seller agent contact information



MISCELLANEOUS

- VA Loans
 - Copy of DD214 (VA Loan)
 - Certificate of eligibility
 - Statement of service
- Retirees
 - Social security award letter
 - Pension award letter
 - Last two years 1099's
- If Applicable
 - Last two years business tax returns and certified profit and loss statements (if self-employed)
 - Investment accounts / 401K & retirement statements
 - Home owners insurance agent name & number
 - Divorce decree and evidence of alimony or child support
 - Bankruptcy papers and discharge notice
 - Rental agreements for all properties owned
 - Copy of all current mortgage statement(s)
 - Proof of taxes & insurance on all properties

Call today to have your questions answered! **503.636.6000**