



APPLYING FOR A HOME LOAN?

Depending on your home loan product,
a combination of the below documents may be requested.

Employment History & Assets:

- ☐ Paystubs for the last consecutive 30 days
- ☐ Prior years' W-2
- ☐ Two years' employment history
- ☐ Gross monthly amount for retirement, Social Security or disability income
- ☐ Two most recent monthly bank statements (checking, savings)
- ☐ Two most recent statements for 401k/retirement, stocks and mutual funds
- ☐ ID/Passport

Residence History:

- ☐ Previous addresses for the last two years and how long you have lived at each residence
- ☐ If you currently rent, land lord's name, address and telephone number to verify the most recent 12 months' rental history

Self Employed Borrowers:

- ☐ Copies of the most recent two years' business tax returns with all schedules
- ☐ YTD P&L and balance sheet
- ☐ Copy of business license or CPA contact information
- ☐ 1099 or K1's

Veteran Loans:

- ☐ Veteran DD214 or Reservist DD256
- ☐ Original Certificate of Eligibility (COE)

Refinancing Additional Documents:

- ☐ Most recent property tax bill/assessment
- ☐ Homeowner's Insurance Dec Page
- ☐ Most recent mortgage statement or payment coupon
- ☐ HOA Dues/coupon (if applicable)

CALL TODAY FOR MORE INFORMATION!



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