

Lender Checklist

To facilitate loan qualifying bring the following to your appointment with the lender.

- Copy of your accepted earnest money contract.
- Copy of Social Security cards and picture ID.
- Res. addresses for past 2 years; landlords address and number.
- Name and address of employers (past 2 years), with two years W-2's and 1099's or 2 years tax returns.
- Last pay stubs showing gross monthly and all deductions for 1 month.
- Last 3 statements of checking, savings, investment, IRA and retirement accounts.
- Names, addresses, account numbers, balances and monthly payments on all debts.
- Addresses, loan info and lease agreements on all Real Estate owned.
- Estimated value of furniture, clothing, jewelry, and personal property.
- Face values and cash values of life insurance, retirement accounts, profit sharing accounts.
- Certificate of eligibility and/or DD214 and/or statement of service for VA loans.
- If self-employed, 2 years income tax records with all schedules, YTD P&L statement with balance sheet prepared by CPA.
- If a corporation or partnership all of the items on the previous line for the corporation or partnership.