



Dear:

Thank you for allowing me to help you with your financing needs. My primary goal is to obtain the best possible loan for your refinance or home purchase. Please provide the following information to expedite your transaction:

- Completed Online Application
- W-2's or 1099's for 2015 and 2016
- Federal Tax Returns (1040) with all schedules for 2015 & 2016
- **Self-Employed: Year-to-Date Profit & Loss, Federal Corporate Tax Returns (1120) for 2015 & 2016, Partnership Tax Returns for 2015 & 2016**
- **K-1's for all partnerships reported in personal returns for 2015 & 2016**
- Most Recent Pay Stub for 30 days for all borrowers
- 2 Months most current Bank Statements for all accounts: Checking, Savings, 401K, Retirement, Mutual Funds, IRA's, Etc. **(All Pages)**
- Copy of Social Security Card, Driver's License or ID
- Copy of Pension (award letters) or any other income received
- Current Mortgage Statement on all existing mortgages (all properties)
- Hazard or Fire Insurance Information (all properties)
- Copy of Rental and/or Lease Agreements if applicable (all properties)
- Name Address & Phone Number of Landlord if you currently rent
- Copy of Trust

Additional Items Needed:
