

PRELIMINARY FINANCIAL INFORMATION CHECKLIST  
(Items needed to expedite your loan application process)

- Pay stubs for most recent 30 day period
- 2 most recent years W2's and or 1099's
- Complete copy of 2 years tax returns, including all schedules, business and personal (if self-employed or own rental property – be sure 1040 is signed)
- If Self-Employed, last 2 years tax returns for your business(s), if applicable
- 2 months most recent bank statements (checking/savings-- all pages, even if blank for standard bank language)
- Most recent 401k/retirement statement, if applicable and you want to use as an asset on application
- Clear copy of driver's license(s) and one other government issued ID (i.e., social security card, permanent resident card, military ID, etc.)
- Employment history for last 2 years-- employer, dates employed, last salary
- Residential history for last 2 years (address and dates resided there), indicate whether owned or rented
- Complete copy of child support paperwork, if you will use child support as income
- Copy of Lease agreement(s), if rental property will be used for income

NOTE: Only 1 copy needed for "Joint" account information.