

PRELIMINARY FINANCIAL INFORMATION CHECKLIST

(Providing these items will expedite your loan application process*)

- Pay stubs for most recent 30 day period and/or recent Social Security/Pension Award Letter(s)
- 2 most recent years W2's and/or 1099's
- Complete copy of most recent 2 years tax returns, including all schedules, business and personal (if self-employed or own rental property)
- 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 plan statement(s), 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/alimony documents, if you will use as qualifying income or if you are obligated to pay
- Copy of Lease agreement(s), if rental property will be used for income

*NOTE: If preferred, you may choose to provide the details of this information in a summary statement and provide the supporting documents after initial application process has begun.