

## **Application Checklist:**

### **Income**

- Pay stubs covering the most recent full month
- W-2s for the past two years
- Individual tax returns for the past two years, including all schedules
- Business/Corporate/Partnership tax returns for the past two years, including Schedule K-1
- Social Security or Retirement Award Letter
- Other \_\_\_\_\_

### **Assets**

*Please be sure that all pages of the requested statements are provided.*

- Bank statements for the most recent two full months
- Investment statements for the most recent two full months or most recent quarter
- Retirement or IRA statements for the most recent two full months or most recent quarter
- Other \_\_\_\_\_

### **Miscellaneous**

- Homeowners' insurance:
  - Company/Agent \_\_\_\_\_
  - Phone number or other contact information \_\_\_\_\_
- Purchase and Sale Agreement and all addenda, fully executed by all parties for subject property
- Purchase and Sale Agreement or Closing Statement for current residence
- Homeowner's Association:
  - Contact information \_\_\_\_\_
  - Project name \_\_\_\_\_
- Copy of Note for existing mortgage being refinanced or subordinated to this transaction
- Other \_\_\_\_\_
- Other \_\_\_\_\_
- Other \_\_\_\_\_

*Additional items may be required to approve your application.*