

LOAN APPLICATION CHECKLIST

Below is a generalized list of the documentation you will need for your pre-approval.

TO BE PROVIDED BY ALL BORROWERS:

- Valid driver's license or other government-issued photo identification (front & back.)
- Most recent two months statements from all asset accounts (checking, saving, stock, mutual funds, IRA's, or other liquid asset accounts.)

TO BE PROVIDED BY W2 BORROWERS:

- Pay stubs for the past 30 days.
- W-2 forms for the past two years.

TO BE PROVIDED BY SELF-EMPLOYED BORROWERS:

- Copies of business tax returns for the past two years, including all schedules (both personal and business).
- Most recent two years w2s &/or K-1 income statements.

TO BE PROVIDED DEPENDING ON YOUR SITUATION:

- For those divorced: A copy of the final decree, particularly the financial settlement page.
- Bankruptcy within the last 7 yrs: A copy of all documentation including the discharge.
- Documentation of additional income sources: For example, Pension awards letter, Social Security statements, Alimony, Retirement, or any other income sources.
- If you own real estate: Most recent mortgage statement(s), if not escrowed, the real estate tax bill, insurance declaration page, and HOA coupon statement.
- VA loan applicants: A copy of your DD-214 or Statement of Service.



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