



INFORMATION NEEDED AT LOAN APPLICATION

Copy of Driver's License or State Issued Photo ID

Copy of Social Security Card, W2, 1099

Original Counseling Certificate

Income Documentation:

Current Social security Award letter, 2 months bank statements - all pages

1099 SS, plus 2 months bank statements - all pages

Pension – contact info – verify continues for 3 years, 2 months bank statements - all pages - verify direct deposit

W2 and two most recent paystubs

Self Employed – 2 years tax returns YTD P&L, Corporate Returns

Homeowners Insurance Agents name, phone number and policy number copy of Homeowners Insurance Declarations page

Copy of current mortgage statement

HOA Management Company – 24 mo pmt history. Name and contact info

Copy of complete trust documents - all pages

Power of Attorney/Conservatorship documents – ID for POA/Conserv

Solar Lease – need copy of lease agreement or purchase documents

Bank Statements – if short to close/funds at closing – two months, all pages

Bought or sold any properties within past 24 months

if so, need HOI, HOA info

Original copy of death certificate

Credit card for Appraisal – \$500

Credit Freeze

Other _____

Other _____