

ITEMS TO HELP EXPEDITE THE LOAN PROCESS

This checklist is provided to make sure you include everything needed to process your loan application quickly once your intent to proceed has been received. Mark each box as you locate the necessary information.

- Provide a copy of executed sales contract.
- If salaried, copies of most recent two (2) years Tax Returns and W-2 forms and one (1) current paycheck stub for the month.
- If self-employed, copies of the two (2) most recent year's tax returns and W-2 forms (all schedules) and original signatures. Year-to-date financial statement, profit & loss statement, and balance sheet.
- Provide two (2) most recent months bank statements (include all pages) on all checking, savings, CD's, credit unions, etc.
- If selling present home, provide a copy of the sales contract. If sold, provide a copy of the Settlement Statement.
- Provide deed(s) on all other real estate owned if paid in full.
- If your company is relocating you and purchasing your current home, provide verification of such and a copy of relocation package.
- If receiving a gift from a relative for your down payment and closing costs, verification of such is required. Contact your loan officer for instructions.
- If you pay child support or have been divorced in the last 7 years, provide a copy of your divorce decree.
- If you wish to include child support as income for qualifying, provide a copy of your divorce decree as well as copies of canceled checks or a schedule from the courthouse showing when payments were made for the past 12 months.
- Survey for refinance loans.
- Copies of current drivers licenses and social security cards or other identifying documents for all parties to the transaction.
- Name and phone number of Insurance Agent:

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