



Loan Documents Checklist

***Note:** this is a general guide of what will be needed during the loan application; not every item may be necessary for you. Likewise, there may be additional items needed in your case.*

Income Documents

- ☐ Past Three years of W-2s and/or 1099s
- ☐ Pay stubs covering one month of income
- ☐ Two years Federal tax returns (all pages)
- ☐ Bank statements covering three months (all accounts; all pages)
- ☐ Social Security award letter for current year
- ☐ Copy of Driver's License & Social Security cards

Self-Employed

- ☐ Past two years corporate tax returns
- ☐ Current year Profit & Loss statement (YTD)
- ☐ Current year Balance Sheet (YTD)
- ☐ Past three months business bank statements

Refinance

- ☐ Latest mortgage statement
- ☐ Homeowner's insurance
- ☐ HOA statement

VA Loans

- ☐ Certificate of Eligibility
- ☐ DD214
- ☐ Nearest living relative
- ☐ Childcare letter (stating you are not paying for childcare; if applicable)

Once complete, you may email documents to either:

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