

Document Checklist

Income Documents

- ☐ 2 Recent Pay Stubs
- ☐ 2 Recent 2yrs W2s or 1099s
- ☐ 2 Recent 2yrs Tax Returns, All Pages
- ☐ Letter of explanation for employment gap

Asset Documentation

- ☐ 2 mo Bank Statements, all pages
- ☐ 2 statements from 401k/IRA/Stocks

Self Employed

- ☐ Recent 2yr Business Tax Returns
- ☐ Audited P&L from CPA

Identification

- ☐ Drivers License
- ☐ Social Security Card

Newly Employed

- ☐ Job offer Letter
- ☐ School transcripts
(in place of 2yrs work history)

Currently Own Property

- ☐ Mortgage Statment for all properties
- ☐ Homeowners Insurance for all properties
- ☐ Lease/Sales contract for current residence

Retired

- ☐ Most Recent SS Awards Letter
- ☐ Most Recent Retirement Award Letter
- ☐ Most Recent Retirement Statement

Miscellaneous

- ☐ Bankruptcy Paperwork (all pages)
- ☐ Divorce Decree
- ☐ Stipulation from Divorce
- ☐ Court Order for Child Support
- ☐ 2 Mo Proof Of Child Support Received