



WHAT YOU NEED FOR A COMPREHENSIVE REVIEW OF YOUR MORTGAGE QUALIFICATION

Self-Employed Individual

- Driver's License
- Social Security Card
- 2 years most recent personal tax returns
- 2 years most recent business tax returns — if you do not file Schedule C
- 2 months most recent bank statements that includes down payment money — all pages of the statement
- Most recent investment account statement-(401k, 403b, IRA, ect.) — all pages of the statement — if applicable
- Mortgage statement for any other properties owned — if applicable
- Tax bill for any other properties owned

Wage Earners or Retired

- Driver's License
- Social Security Card
- One Month most recent paystubs
- 2 years most recent W2's
- 2 years most recent tax returns all pages
- 2 months most recent bank statements that includes down payment money — all pages of the statement
- Most recent investment account statement-(401k, 403b, IRA, ect.) — all pages of the statement — if applicable
- Tax bill for any other properties owned
- 2 years most recent 1099 tax forms — if applicable
- Most recent Social Security Awards Letter — if applicable
- Most recent Pension Awards Letter — if applicable

Thank you in advance for allowing me to help you.

**Depending on the situation additional information may be necessary.*



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