



Lending based on family values: Honesty, Sincerity, Integrity

Loan Application Checklist

- W2- most recent two years
- 1040- most recent two years (all schedules please sign 2nd page of returns if it is a copy)
- Current paystubs- all from the last 30 days
- 2 months of bank statements (all pages)
- Most recent copy of 401K or IRA statement
- Copy of HUD settlement statement and Note from most recent refinance/purchase
- Current mortgage statement
- Copy of homeowners insurance declaration page or agents name & number
- Copy of your driver's license and Social Security card- (clear enough to read the numbers on the page)
- If business owner also include
 - K1s - most recent 2 years
 - Business returns- most recent 2 years