



Loan Application Instructions

In the process of obtaining a loan, there are required forms and documentation needed. All the necessary forms are enclosed and need to be filled out completely and accurately in order to expedite your loan. Return these forms with the documentation listed and/or requested by your loan agent.

- 2 current (within 30 days) pay stubs
- W-2's for prior 2 years
- 2 current consecutive Asset Account Statements (Checking/Savings, IRA, 401K, etc. - Be sure to send ALL pages.)

Additional items needed:

Refinances Only:

1. Copy of current mortgage statement(s)
2. Name and address of Homeowner's Insurance Agent
3. Copy of all Credit Card accounts to be paid with loan

Self-Employed and/or Commissions:

1. Federal Tax Returns (1040's) for prior 2 years
2. Corporate and/or Partnership returns for prior 2 years

Rental Property Owners:

1. Lease Agreement(s)
2. Federal Tax Returns (1040's) for prior 2 years

Other Income:

1. Social Security/Pension Income
2. Alimony and/or Child Support
3. Note income
4. Disability

Documentation Needed:

1. Award Letter
2. Divorce Decree
3. Copy of Note
4. Award Letter/Disability Letter
5. Driver's License and Social Security card

I appreciate your confidence and the opportunity you have given me to work with you. My goal is to make the process as simple and easy as I can, but I want you to feel free to contact me with any questions you might have. Thank you.