

# Required Documentation

Here is a \*list of some of the documents you may be asked to provide.

## EMPLOYMENT & INCOME VERIFICATION

- Most current paystub(s) covering a 30-day period for all jobs.
- Copy of 2022, 2023 W-2's from all employers. (1099's if self employed)
  
- Copy of complete, signed and dated Federal Tax Returns for 2023 & 2022 (Including partnerships, corporations, and K-1's) State tax returns are not necessary. **Note: please sign & date page 2 of form 1040.**
  
- Copy of award letter and 1099 for social security, disability, retirement, foster care or adoption support income.

## ASSETS

- Copy of most recent 2 months bank statements for all accounts.
- Copy of most recent stocks and/or bonds statements.
- Copy of 401k, IRAs or other retirement accounts.

## SUBJECT PROPERTY & RENTAL PROPERTY & SECOND HOMES

- Copy of subject property's note.
- Copy of payment coupon for all mortgages.
- Signed Rental Agreement. (For all rental properties)
- Evidence of Homeowner's Insurance. (Declaration Page)

## OTHER DOCUMENTATION (IF APPLICABLE)

- Copy of divorce or separation decree.
- Copy of Bankruptcy Papers. (With all schedules)
- Evidence of child support or alimony payments paid or received.
- Photocopy of Drivers License.
- Copy of Business License or CPA letter.
- Gift Letter.

\*Print and use as a check list.