

Loan Documentation Checklist

Use the checklist below to ensure you have the necessary documents to proceed with the mortgage process:

Income

- Paystubs - most recent, received in a 30 day period
- Personal Federal Tax Returns - most recent, 2 years of 1040/1120/1065. All pages & all schedules.
- W2's and/or 1099's - most recent, 2 years for income history

IF you own 25% or more of any LLC, S-Corp, Partnership etc

- 1120 and/or K1's - most recent, 2 years
- Business Returns - most recent, 2 years

Assets

Please include ALL numbered pages, front & back, even if they are blank.

- 2 months statements for ALL assets (Bank, IRA's, 401k's, etc)
- Escrow/Transaction information if you are selling your current home
- Retirement Statements including terms of withdrawal (if necessary)

Property

- Current Mortgage Statement
- Rental/Lease Agreements for all Rental Properties Owned
- Detailed Landlord Contract Information/Lease Agreement (if you are currently renting)
- Homeowners Insurance - Contact Information & Declaration Page or Quote

Other

- Clear copies of a Government Issued ID
- Divorce Decree - If applicable, certified or signed copy by the Court

If you have questions or concerns about the necessary documents contact your loan officer.



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