



Detailed Document Needs Checklist: A thorough guide to get your application process going in the right direction.

Personal Information

- Drivers License, a clear copy
- Permanent Resident Alien Card/ Green Card (front and back) if applicable
- Mortgage Statements
- Property Tax Bill
- Hazard Insurance Declaration Page
- Lease Agreements (all pages)
- Home Owners Association Bill (HOA)

Assets

- Bank Account Statements – 2 months, all pages
- 401K Statements – 2 months/quarterly, all pages
- IRA Statements – 2 months, all pages
- Stocks/Bonds – 2 months, all pages

Income Documentation

- Pay Stubs (most recent, 30 days)
- W2's – last 2 years
- 1099 – last 2 years (if applicable)
- Federal Tax Returns (1040) – all pages & schedules (2 years)
- Social Security Awards Letter
- Pension Letter
- Divorce Decree – for Alimony and/or Child Support

If Self-Employed

- K1's – 2 years
- Federal Business Tax Returns – 2 years – all pages & schedules

Our goal is to help you get the best possible loan for your home purchase or refinance. To expedite the process and lock in the best rates, it's important that you promptly provide the documents listed above along with your signed and dated Loan Application.

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