



All Borrowers

___ **Driver's License** Photo ID or Passport (**Clear-Legible** -- Copy/Picture/Scan -- Color preferred)

___ **Personal Tax Returns** (**all pages**) for the most recent **two** years available.
*If extension was filed need proof of extension

___ **Bank Statements** (**all pages**) for the most recent **two** months
*Any large non-payroll deposits must have supporting documentation of the source.

___ **IRA, 401k or Retirement Statements** (**all pages**) for the most recent quarter or 30-days.

Salaried / Hourly Borrowers

___ **Pay-stubs..** **1 full month** showing year-to-date earnings

___ **W-2 Forms..** for the most recent **two** years

Self Employed Borrowers

___ **W-2s, K-1s and 1099s** for the most recent **two** years

___ **Business Tax Returns** (**all pages**) *if you own 25% or more of the business.

___ **Year-to-Date P & L** *if you own 25% or more of the business

Retired Borrowers

___ **1099s** for Social Security and Pension income for the past **two** years.

___ **Proof of Direct Deposit** for current monthly Social Security and Pension

___ **Social Security and/or Pension Award letters** showing income will continue **at least** 3 years.

Corporate Office
17717 Hunting Bow Circle
Lutz, FL 33558
250769

Sarasota Branch
630 South Orange Ave #104
Sarasota, Florida 34236
NMLS# 1228348

Christopher M. Hunt
Phone 941.388.7017
Fax 866.203.8434 NMLS#
NMLS# 938295



Mortgage Application - Document Checklist

Divorced or Receiving Child Support and/or Alimony

___ **Divorce Decree** (all pages) including separation agreement if available.

___ **Proof ex-spouse** has been making agreed Child Support and/or Alimony (**on-time**) for the past 12 months and income will continue **at least** 3 years from closing.

___ **Birth Certificates** (or passport or, photo ID) of children receiving income support for.

Refinance Borrowers

___ **Recent Mortgage Statement**

___ **Survey**

___ **Owners Title Policy**

___ **Homeowners Insurance Dec. Page**

___ **HOA Fees** (if applicable)

If Applicable

___ **Landlord Contact Information**

___ **Lease Agreement(s)** for any rental properties **owned** and **not** shown as income on most recent tax return.

___ **Recent mortgage statement(s)** **for all** Real Estate owned (financed properties)

___ **Proof of property taxes, insurance declaration page and proof of HOA Dues** on all Real Estate owned

___ **Disability Awards letter** showing income will continue **at least** 3 years including proof of direct deposit.

Please contact me with any questions you may have.

- Chris

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