

# Document Checklist



- Copy of your Driver's License
- Most recent two Year to Date paystubs
- Most recent two W2s & personal federal tax returns(all pages, K'1s and schedules)
- If own 25% or more of a business, provide 2 years business returns and K'1's (all pages)
- Most recent two financial statements for checking/savings/brokerage/retirement accounts (all pages)
- Quarterly 401k statement & plan document or manual for employer sponsored retirement account (all pages)
- If applicable, current mortgage statement & association/condo fee statement for all properties owned



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*scan to get started*

