



**VOLUNTARY CHECKLIST OF POSSIBLE DOCUMENTS NEEDED**

YOU MAY VOLUNTARILY PROVIDE THE DOCUMENTS BELOW; THESE DOCUMENTS MAY BE REQUIRED FOR UNDERWRITER PURPOSES. PLEASE KNOW YOU ARE VOLUNTEERING THIS INFORMATION; THESE DOCUMENTS ARE NOT REQUIRED TO BE SENT UNTIL YOU HAVE ENTERED INTO LOAN APPLICATION AND RECEIVED AND REVIEWED YOUR INITIAL LOAN ESTIMATE AND YOU HAVE PROVIDED INTENT TO PROCEED WITH YOUR LOAN APPLICATION

IF APPLIES	ITEM
<input type="checkbox"/>	<b>2023, 2022 W-2s</b>  (If Self Employed – 2 years most recent Tax returns Both Business and Personal)
<input type="checkbox"/>	2 Months most recent <b>Pay Stubs</b>
<input type="checkbox"/>	<b>2 Months most recent Bank Statements</b> <b>IRA, 401k , Stocks most recent statements</b>
<input type="checkbox"/>	<b>Copy Mortgage Statement(s)</b>
<input type="checkbox"/> <b>FOLDER</b> <b>ALL THESE</b> <b>ITEMS ARE IN</b> <b>THE LAST</b> <b>MORTGAGE</b> <b>FILE YOU</b> <b>RECEIVED</b> <b>FROM THE</b> <b>TITLE</b> <b>COMPANY</b>	Copy of:  <b>NOTE</b> (for 1 <sup>st</sup> and 2 <sup>nd</sup> Mtg) <b>MORTGAGE</b> (or Deed of Trust) <b>SURVEY</b> <b>SETTLEMENT STATEMENT</b>  (All of these items will be in your closing package from the title company from your last mortgage).
<input type="checkbox"/>	Home Owners Insurance declarations page
<input type="checkbox"/>	Copy of <b>Drivers license-</b> Copy of <b>Social Security</b> Cards (if available) OR 2 <sup>nd</sup> form of ID
<b>IF Applicable</b> VA (Veterans) <input type="checkbox"/>	<b>VA</b> Award Letters <b>2024</b> <b>1099's</b> 2023, 2022, (if applicable)
<b>IF Applicable</b> Social Security <input type="checkbox"/>	<b>Social Security, Pension</b> Award Letters <b>2024</b> <b>1099's</b> 2023, 2022, (if applicable)

**Please call with any questions:**

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Phone: 505-836-5700  
**E-Fax: 505-212-0633**

**NOTE:**

Before we can submit your loan, we **MUST** receive **100%** of the items listed on this sheet that apply to you