

Basic Checklist

Items needed to proceed:

- 2012 and 2013 tax returns (all federal pages including K-1s if applicable)
- 2012 and 2013 W-2s (or 1099s if applicable)
- 30 days paystubs
- Best number for HR to verify employment
- 2 months bank statements all pages – showing name, address, account number, bank name/logo.
- 2 year housing history – contact information for landlord if applicable
- Purchase agreement executed including all disclosures
- Earnest money deposit check to seller
- Proof the earnest money deposit cleared your account (provide updated banking history once it clears your account)
- Contact information for all parties (form provided)
- All loan documents signed and dated.
- Credit card info for appraisal.

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Property & Contacts

Property: _____ **Price:** _____

Type: Single fam / 2-4 unit / Condo / Townhome **Seller concessions:** _____

Contract expiration date: _____

Borrower: Name _____ Best # _____

Email _____

Co-borrower: Name _____ Best # _____

Email _____

Landlord for last 2 years: Name _____ Best # _____

Name _____ Best # _____

Employment Verification: Company _____ Best # _____

Employment Verification: Company _____ Best # _____

Selling agent (assists buyer): Name _____ Best # _____

Company _____ Email _____

Listing agent (assists seller): Name _____ Best # _____

Company _____ Email _____

Title company: Name _____ Best # _____

Company _____ Email _____

Condo HOA contact (if applicable): Name _____

Best # _____

Company _____ Email _____

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