

# LOAN APPLICATION CHECKLIST

**Want your mortgage loan application processed fast? So do we!  
Here's how you can help.**

Please provide copies of all applicable items below:

**PERSONAL INFORMATION** (Complete this information on the secure online loan application)

- Name, address and phone numbers for all employers for the last 2 years
- Residency history for the last 2 years

## **INCOME**

**If You Are A Salaried Employee:**

- Pay stubs covering the most recent 30 days
- W-2 forms for the last 2 years

**If You Are Self Employed or Receive Commission Income:**

- Personal tax returns (1040) for the past 2 years, including all schedules
- If incorporated, corporate tax returns (1120) for past 2 years
- Year-to-date Profit & Loss Statement

**Other:**

- Rental Income - Lease agreement or 2 years tax returns
- Retirement Income - Awards letter and pay stub covering the most recent 30 days
- Child Support - Proof of receipt for last 12 months and divorce decree

## **ASSETS**

- Most recent 2 months of statements (all pages) for checking, savings, etc.
- Most recent quarterly statement (all pages) for retirement accounts

## **OTHER**

- Copy of Driver's License and Social Security Card
- Contract on the new home you are buying
- Contract/listing agreement on home you are selling
- Divorce decrees/Child Support agreements
- Bankruptcy papers (Original petition and discharge, all pages)

## **VA LOANS ONLY**

- DD 214 and Certificate of Eligibility

**You can fax these items to me at 1-888-758-9559 or email to [john@dallasmortgagepro.com](mailto:john@dallasmortgagepro.com). If these options are not convenient, please let me know so we can make other arrangements.**

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**The following additional documents are necessary if your loan is a refinance:**

- Property Survey
- Note, Deed of Trust & HUD-1 Settlement Statement
- Most Recent Payment Statement on Current Loan, showing loan number, current principal balance and escrow account balance

The first two items should be in your closing package from when you purchased your home or a previous refinance. If you have any questions regarding these items, please contact your loan officer.