

Loan Documentation Checklist



*Documents Needed for All Loan Applications.
This is a two year history of employment, residence, assets and liabilities.*

- Most recent full 30-days of pay stubs
- Two Most Recent Years Complete Tax Returns
- Two Most Recent Years W-2's (K-1 and 1099's if applicable)
- Two Most Recent Years Complete Corporate Tax Returns (if you own 25% or more of your company)
- Award Letter verifying Social Security, Pension or Disability

Asset

- Two most recent Bank Statements (all pages)
- Two most recent statements for any other investment accounts
- Documentation for any large deposits over \$500 (other than payroll)
- Signed Gift Letter and Documentation of Transfer from Donor (please contact your Loan Officer for more information)

Other

- Clear copy of Driver's License
- Copy of Settlement Statement, Note and Deed from current loan
- Complete Divorce Decree and Child Support Order (if applicable)
- Complete Bankruptcy/Foreclosure documents (if applicable)
- Explanation for any Derogatory Credit (if applicable)

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The Pfitzer Team

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