

Janet Friedman loan checklist

it's **loan-ly** at the top, be **ahead**

- 2 YEARS TAX RETURNS FILED (ALL PAGES)
PERSONAL AND ALL BUSINESS ENTITIES
EXTENSION(S) FOR MOST RECENT YEAR (IF APPLICABLE)
- 1 FULL MONTH'S PAYCHECK STUBS (OR DEPOSIT ADVICE)
- 2 YEARS W-2S/K-1S/1099S
- CONTACT INFORMATION FOR EMPLOYER OR CPA (SELF-EMPLOYED)
- 2 MONTHS OF BANK STATEMENTS (ALL PAGES)
 - CHECKING
 - SAVING
 - MONEY MARKET
 - RETIREMENT (MOST RECENT QUARTER STMT/IF APPLICABLE)
- DRIVER'S LICENSES FOR ALL BORROWERS
- PROPERTY INFORMATION
 - CONTRACT (PURCHASE)
 - LEGAL DESCRIPTION OF PROPERTY (LOT, BLOCK, ETC.)
 - SURVEY
- CURRENT PROPERTY OWNED (ALL PROPERTIES)
 - CURRENT MORTGAGE STATEMENT(S)
 - CURRENT INSURANCE INFORMATION
 - CURRENT PAID TAX STATEMENT
 - LEASES (IF APPLICABLE)
- CREDIT CARD/INVOICES TO BE PAID OFF
- INSURANCE AGENT'S NAME/PHONE NUMBER AND EMAIL

For questions or appointments please **CONTACT US** or call **713/785.LOAN (5626), 512/527.0600**