

BORROWER CHECKLIST

Item Needed	Description	Comments
Loan Application	<ul style="list-style-type: none"> - Signed loan application disclosures - Credit card for the credit report and appraisal fee 	
ID	<ul style="list-style-type: none"> - Driver's license - VISA (if resident alien) 	
Employment	<ul style="list-style-type: none"> - HR or Payroll contact 	
Income	<ul style="list-style-type: none"> - Paystubs (30 days) - W2s <p>If self-employed:</p> <ul style="list-style-type: none"> - Personal tax returns - 1040 - Business tax returns – 1065 or 1120 - Business P/L and balance sheet YTD 	
Assets	<ul style="list-style-type: none"> - Bank statements (2 months, all pages) - Evidence of Earnest Money / Option Fee checks cleared - Documentation / explanation of large deposits - Gift documentation 	
Liabilities/Credit	<ul style="list-style-type: none"> - As needed 	
Subject Property	<ul style="list-style-type: none"> - Homeowner's insurance quote or agent's contact 	
Other Property	<ul style="list-style-type: none"> - Mortgage statement - Property tax bill - Home insurance declarations - HOA - Lease agreement 	If under LLC, please send the LLC tax returns

THANK YOU!

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