

# Pre-Approval Document Checklist



Below is a list of the documents which will be needed to complete a pre-approval. Items marked with an asterisk (\*) may not be needed. If you have the items marked with an asterisk (\*), you can speed up the approval process by having them available.

## INCOME

- Provide your employment information including the employer(s) name, address, and phone number for the past 2 years.
- Provide all W-2's for the past two years.
- Provide most recent, consecutive pay stubs for 1 month.
- If self-employed, provide the last 2 years' signed and dated personal and business tax returns (if applicable) with all schedules attached, including Schedule K-1, if applicable.
- If self-employed, provide YTD Balance Sheet and Profit & Loss Statement.\*
- If retired, provide benefit award letter, last two years 1099's, and all pages and schedules of last two years tax returns.
- If you are relying on any rental income, provide copy of current lease agreement and mortgage statement.

## ASSETS

- Provide the 2 most recent statements for all deposit and investment accounts (checking, savings, stocks, IRA, 401k, etc). Statements must show your name, account number and the name of the banking institution.\*