

BUYERS lender checklist

- ❑ **W-2 forms**
or business tax return forms if you're self-employed — for the last two or three years for every person signing the loan.
- ❑ **Pay Stubs**
Copies of at least one pay stub for each person signing the loan.
- ❑ **Credit Card Information**
Account numbers of all your credit cards and the amounts for any outstanding balances.
- ❑ **Bank Statements**
Copies of two to four months of bank or credit union statements for both checking and savings accounts.
- ❑ **Installment Loan Information**
Lender, loan number, and amount owed on other installment loans, such as student loans and car loans.
- ❑ **Former residence addresses**
Addresses where you've lived for the last five to seven years, with names of landlords if appropriate.
- ❑ **Financial Asset Statements**
Copies of brokerage account statements for two to four months, as well as a list of any other major assets of value, such as a boat, RV, or stocks or bonds not held in a brokerage account.
- ❑ **401K Statements**
Copies of your most recent 401(k) or other retirement account statement.
- ❑ **Additional Income Documentation**
Documentation to verify additional income, such as child support or a pension.
- ❑ **Tax Returns**
Copies of personal tax forms for the last two to three years.

