



Purchase / Refi Documents List

To access your financial situation, please provide:

- _____ 2019 & 2020 1040s with all schedules
- _____ 2019 & 2020 W2s and 1099s
- _____ Most Recent Paystubs (Last 60 days) for all borrowers
- _____ 2 Most Recent Bank Statements (all pages) for all borrowers
- _____ Homeowner Insurance Declaration all properties owned
- _____ Most Recent Mortgage Statement all properties owned
- _____ Copy of Picture ID & Social Security
- _____ Email Address for all borrowers
- _____ Cell phone Numbers for all Borrowers, home phone number if applicable
- _____ 2 Year Job History – Start date, HR contact phone number, position
- _____ Most Recent Statements for Solar and Heloc loans

If applicable, please provide:

- _____ 2018 & 2019 Business Tax Returns (**if own a business**)
- _____ Recent 401K or Retirement Savings Statement
- _____ Spouse's Death Certificate (**if still on title**)
- _____ Divorce Decree
- _____ Award Letter and/or Benefit Statement for Social Security and/or Pension
- _____ Last HOA Bill

If rental income is used, please provide for each property:

- _____ Copy of Rental Agreement
- _____ Mortgage Statement, Tax & Insurance; HOA Bill
- _____ Homeowner Insurance Declaration

BRE# 01526845 **NMLS# 1532157**
22201 Ventura Blvd. Suite 201 Woodland Hills, CA 91364
818-854-6400 office **818-337-2263 fax**

info@omegarealtyva.com