

# LOAN CHECKLIST

## Income

### Salaried Employees

- Most recent 2 paystubs

### Hourly Employees

(with or without overtime, bonus and/or commission)

- Most recent 2 paystubs
- Final paystub from previous 2 years

### Self-Employed (Schedule C)

- Most recent 2 years of complete income tax returns (all forms and schedules)
- Profit and Loss statement ending the most recent quarter

### Self-Employed (Corporations/Partnerships)

- Most recent 2 years of complete personal tax returns
- Most recent 2 years of complete corporate tax returns
- Profit and Loss statement ending the most recent quarter

### Child Support

(include dates of birth for recipients)

- If using Child Support or Alimony as income, copy of agreement as well as proof of receipt of the support for the last six (6) months

### Social Security

- Most recent award letters for all recipients
- If applicable, dates of birth for all recipients who are minors

### Pension/Annuity

- Payment verification for the most recent 2 months
- Award letter stating the duration of receipt of income

### Rental Income

- Most recent 2 years of complete personal tax returns (including Schedule E)
- Copy of current lease(s)

## Employment

- Employer information covering a 24-month period
- W2s for most recent 2 years (all employers)

## Assets

- Most recent 2 months of bank statements for all accounts (all pages even if blank)

## Identification

- Driver's license and Social Security card for borrower and spouse, if borrower is married
- If Social Security card requires DHS authorization, copy of unexpired visa is required

## Contact me for more info!



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By furnishing any and/or all of the documentation, an applicant is in no way obligated to accept the terms and conditions of the mortgage offered, nor does the borrower have to provide these documents to receive a Loan Estimate. Not a commitment to lend. Borrower must meet qualification criteria.