

DOCUMENTS NEEDED TO BEGIN LOAN PROCESS

- * Clear copy of Driver License & Social Security card
- * Two most recent months bank statements (checking, savings, brokerage, retirement, stocks/bonds, source of down payment etc.). Please be sure to include ALL PAGES, (if it says 1 of 8, then we need all 8) If statements are quarterly, please provide most recent quarter
- * Most recent pay stubs covering a full 30 days for all borrowers
- * Last two years W2s
- * Last two years Federal Tax Returns (all schedules). If you have not completed your most recent year's tax return, please provide a copy of the extension
- * If you own a partnership or corporation please provide most recent corporate and/or partnership returns with all schedules (only K1s required if ownership is less than 25%)
- * If you currently own any property, please provide the following for all properties owned. Current mortgage statements, homeowners insurance Dec Page and if there is an HOA, please provide most recent HOA statement.
- * Documentation of Social Security and/or Pension, award letters and pay stubs. (If applicable)

Every loan is unique. So from time to time there may be additional information and/or documents needed from you during the loan process. The quicker we can get the items we need the better and more efficient the whole process will be.

If you have any questions regarding the above information or during the loan process itself please feel free to contact us. We are always available to answer any questions or concerns as we want to make sure you understand every step of the loan process.

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