

# CUSTOMER CHECKLIST



## THE BASICS

- Copy of Driver's License
- Purchase agreement and/or contract with addendums
- Plans and specifications (new construction only)
- Copy of Social Security card
- Other - \_\_\_\_\_

## YOUR ASSETS

- Previous 2 months' bank statements - complete statements for each account (all pages)
- Most recent statement for stocks and bonds, mutual funds, 401(k), IRA account, etc. (all pages)
- Copy of cleared earnest money check (both sides)
- Copy of contract and/or settlement statement on current home
- Most recent mortgage statement or payment coupon for all mortgages
- Other - \_\_\_\_\_

## EMPLOYMENT

- Paystubs from the most recent 30 days
- Tax returns from the most recent 2 years
- W2 forms from the most recent 2 years (K1s if applicable)
- School transcripts (if employed less than 2 years from graduation)

### IF SELF-EMPLOYED:

- Current YTD P&L and balance sheet
- Partnership/Sub S/Corporate tax returns for the last two years (for over 25% ownership)

### OTHER INCOME:

- Social Security - statement of benefits
- If you'd like child support or alimony to be considered, please provide 6 months of canceled checks or proof of deposits
- Other - \_\_\_\_\_

## INSURANCE

- Company, name and phone number of hazard insurance agent (If you would like a referral, please let me know):  
\_\_\_\_\_  
\_\_\_\_\_

- Homeowners Association representative and phone number:  
\_\_\_\_\_  
\_\_\_\_\_

## IF APPLICABLE

- Bankruptcy schedules - petition, discharge and letter of explanation for the bankruptcy
- Divorce papers - Decree, property settlement agreement and separation agreement
- Copies of signed leases for investment properties



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