



IF YOU AND/OR YOUR  
CO-BORROWER ARE . . .

PLEASE PROVIDE ME WITH . . .

---

A SALARIED EMPLOYEE

- Two years federal tax returns;  
three years if loan is over \$500,000,  
and
- Recent paystub

---

SELF-EMPLOYED

- Three years federal tax returns  
and
- Most recent company Profit & Loss Statement  
and Balance Sheet

---

A GENERAL PARTNER (over 25% interest)

- K-1s and federal general partnership tax returns

---

A LIMITED PARTNER

- K-1s

---

INCORPORATED

- Three years federal corporate tax returns  
and
- Most recent Profit & Loss Statement  
and Balance Sheet

---

ALL APPLICANTS

- Most recent bank and brokerage statements  
of assets (including retirement assets)

---

PURCHASING YOUR PROPERTY

- Purchase Agreement  
and
- Name and phone number of Insurance Agent

---

REFINANCING YOUR PROPERTY

- Copy of Insurance Policy  
or
  - Agent's name, phone number and policy number
-