



## **Loan Approval Checklist**

In order to expedite the processing of your loan request, we will need the following items:

### **BASICS**

- 2 most recent paycheck stubs.
- 2 years' most recent personal Federal tax returns, including **W-2's** and all schedules.
- 2 months' bank statements (checking, savings, money market, CD accounts, etc.) ALL PAGES
- 2 months' securities statements (mutual funds, stocks, bonds, etc.). ALL PAGES
- most recent retirement account statement(s), if quarterly statement, most recent quarter is fine. ALL PAGES
- Copy of your driver's license

### **EXTRAS if applicable**

- 2 years' partnership K-1's for any partnerships listed on Schedule E of personal return.
- additional items needed for self-employed borrowers** (defined as owning 25% or more of a business):
  - last two years' corporate tax returns, if organized as a corporation.
  - last two years' partnership tax returns, if organized as a partnership.
  - year-to-date Profit and Loss Statement for business.
- Proof of Social Security, Pension or other income
- rental agreements, if you own any rental properties.
- final divorce decree, if you've been through a divorce.
- bankruptcy and discharge papers with all schedules, if you've filed for bankruptcy.
- last mortgage statement; name and phone number of agent who handles your homeowners insurance if you own a home.
- homeowners association name, address, and phone number, if you are financing a condominium.
- current landlord name and phone number if you are currently renting.
- Gift letter including name, address and telephone number of donor and relationship to borrower
- Copy of Living Trust if putting title in a trust

If you have any questions, please call us at 310-234-3278. Thank you for the opportunity to help you.

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