



## Documents needed for Purchase or Refinance

1. Mortgage statement (Subject Property)
2. Fire Insurance policy - Declaration Page (Subject Property)
3. Current pay-stub's (2 consecutive)
4. 2 year's W2's (recent tax year's)
5. 2 year's 1040's (recent tax year's - Federal only)
6. Bank statements, IRA, 401K, etc (2 months-all pages)
7. Living Trust Agreement on Title (If Applicable)
8. HOA - Statement, Project name and Management number (If Applicable)
9. Mortgage statements - Rental properties (If Applicable)
10. Fire Insurance policy - Declaration Page on Rental properties (If Applicable)
11. Lease agreements on all Rentals (If Applicable)
12. Copy of driver's license for all borrowers

Any questions, please call me at 562-608-8811.

Thank you

*J Mathai*

Joe Mathai  
Senior Loan Officer  
Notary Public

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DRE License# 01781389



NMLS License# 307431

