



Lineage
L E N D I N G

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Documentation Checklist

- ___ Last Two Years Federal Tax Returns & W2'S (All Pages)
- ___ Last 30 Days of Pay Stubs (Proof of Income)
- ___ Last 2 Months of All Bank Statements (All Pages)
- ___ Copy of Current Investment Statements (IRAs, 401ks, etc-All Pages)
- ___ Retirement & Social Security Award Letters
- ___ Rental Agreements (Investment Properties)
- ___ Current Mortgage Statement (For All Properties)
- ___ Current Home Owners Insurance Dec Page (For All Properties)
- ___ Copy of Drivers License and Social Security Card
- ___ Signed and Dated Loan Application and Disclosures
- ___ Signed and Dated Purchase Agreement