

Loan Documents Checklist

Note: this is a general guide of what will be needed during the loan application; not every item may be necessary for you. Likewise, there may be additional items needed in your case.

Income Documents

- Past Three years of W-2s and/or 1099s
- Pay stubs covering one month of income
- Two years Federal tax returns (all pages)
- Bank statements covering three months (all accounts; all pages)
- Social Security award letter for current year
- Copy of Driver's License & Social Security cards

Self-Employed

- Past two years corporate tax returns
- Current year Profit & Loss statement (YTD)
- Current year Balance Sheet (YTD)
- Past three months business bank statements

Refinance

- Latest mortgage statement
- Homeowner's insurance
- HOA statement

VA Loans

- Certificate of Eligibility
- DD214
- Nearest living relative
- Childcare letter (stating you are not paying for childcare; if applicable)

Once complete, you may email documents to either:

ROBERT TRUJILLO
Robert@ZionHomeLoans.com
(714) 350-1358

KORBIN SPANGENTHAL
Korbin@ZionHomeLoans.com
(949) 456-2903