

CUSTOMER CHECKLIST



THE BASICS

- ☐ Copy of Driver's License
- ☐ Purchase agreement and/or contract with addendums
- ☐ Plans and specifications (new construction only)
- ☐ Copy of Social Security card
- ☐ Other - _____

YOUR ASSETS

- ☐ Previous 2 months' bank statements - complete statements for each account (all pages)
- ☐ Most recent statement for stocks and bonds, mutual funds, 401(k), IRA account, etc. (all pages)
- ☐ Copy of cleared earnest money check (both sides)
- ☐ Copy of contract and/or settlement statement on current home
- ☐ Most recent mortgage statement or payment coupon for all mortgages
- ☐ Other - _____

EMPLOYMENT

- ☐ Paystubs from the most recent 30 days
- ☐ Tax returns from the most recent 2 years
- ☐ W2 forms from the most recent 2 years (K1s if applicable)
- ☐ School transcripts (if employed less than 2 years from graduation)

IF SELF-EMPLOYED:

- ☐ Current YTD P&L and balance sheet
- ☐ Partnership/Sub S/Corporate tax returns for the last two years (for over 25% ownership)

OTHER INCOME:

- ☐ Social Security - statement of benefits
- ☐ If you'd like child support or alimony to be considered, please provide 6 months of canceled checks or proof of deposits
- ☐ Other - _____

INSURANCE

- ☐ Company, name and phone number of hazard insurance agent (If you would like a referral, please let me know):

- ☐ Homeowners Association representative and phone number:

IF APPLICABLE

- ☐ Bankruptcy schedules - petition, discharge and letter of explanation for the bankruptcy
- ☐ Divorce papers - Decree, property settlement agreement and separation agreement
- ☐ Copies of signed leases for investment properties

The following list includes the typical documentation reviewed by the Lender to complete the mortgage process. The information is not required to receive a Loan Estimate. After the documentation is reviewed by the Lender, there may be more detailed documentation deemed necessary to complete the mortgage process. By furnishing any and/or all of the documentation, an applicant is in no way obligated to accept the terms and conditions of the mortgage offered."

Erin M Ames
Realtor

Direct 253.259.4744
Fax 253.841.0118

Erinames@johnlscott.com
ErinMVP.com



John L Scott
429 29th Stree NE Suite A
Puyallup WA 98372

John L. Scott
REAL ESTATE

Tina Dworsky
Mortgage Consultant
NMLS# 305534

Direct 253.230.0828

tina@teamdworsky.com
www.teamdworsky.com

Priority Home Lending, LLC
429 29th Street NE Suite A
Puyallup WA 98372

Priority
HOME LENDING, LLC.



Rates effective 11/20/17. This is informational only and should not be relied upon by you. John L Scott is not a mortgage lender. Contact Priority Home Lending, LLC to learn more about and your eligibility for its mortgage products. Not a commitment to lend. Borrower must meet qualification criteria. Company NMLS 1031451. 429 29th St NE, Ste A | Puyallup, WA 98372 | WA: CL-1074616 (NMLS 1074616) | Information is subject to change without notice. This is not an offer for extension of credit or a commitment to lend.