

# THE HOMEBUYER'S DOCUMENT CHECKLIST

## Get a Head Start on Your Homebuying Journey

The most successful homebuyers are often the most prepared. To streamline your home search process and reduce stress, we've compiled a list of essential documents you'll need for loan pre-approval. By gathering these items now, you'll be ready to move quickly when it's time to make an offer, provide earnest money, schedule inspections, and more.

Give yourself a competitive edge and make your homebuying experience smoother by getting a jump start on your paperwork today.

### STEP 1 - PLEASE PROVIDE YOUR SUPPORTING DOCUMENTS:

Kindly provide the most recent copies of your:

- Valid Government ID
- Pay Stubs for the last 30 days, if applicable
- W-2's and/or 1099's for the last two years
- IRS Tax Returns for the last two years, all pages & schedules please
  - If Self Employed, kindly include your Business IRS Tax Returns
- Bank & Retirement account statements for the last 60 days
  - **All pages please**, even if they are intentionally left blank
  - Kindly note large or uncharacteristic deposits will likely need to be sourced

### STEP 2 - PLEASE PROVIDE THE PROPERTY SUPPORTING DOCUMENTS:

Once you have picked your house and are under contract, please provide copies of the following:

- Executed Purchase Contract
- Option Money Check
- Earnest Money Check
- Homeowners Insurance contact information

If you own other Real Estate, please provide the most recent copies of the items below for all properties owned in your personal name:

- Mortgage Statement(s)
- Homeowners Insurance Declarations Page(s)
- Property Tax Statement(s)
- Survey (for subject properties only)
- HOA Statement(s), if applicable
- Lease Agreements, if applicable

Past Clients have been able to provide us their documents in less than 88 minutes, how fast are you?

**Fun Fact** →

