



PURCHASE LOAN CHECKLIST

SEND TO: EMAIL: Horst@QMSlending.com

FAX: 305-517-1495

REQUIRED DOCUMENTS TO PREQUALIFY:

- DRIVER LICENSE *(Must be a clear copy)*
- SOCIAL SECURITY CARD *(If you lost or don't have your card let me know, I have an alternative)*
- LAST 2 MOST RECENT YEARS **COMPLETE** TAX RETURNS (If only receiving social security and or disability & do not file taxes, that is OK & tax returns are not required in this circumstance)
- IF YOU OWN A BUSINESS - LAST 2 YEARS COMPLETE BUSINESS TAX RETURNS ARE NEEDED.
- IF A VETERAN, A COPY OF YOUR DD214 IS NEEDED

**** Please review the list of incomes below and provide only what applies to you, some of these may not apply to everyone ****

**** Please make sure to email these documents as PDF's ****

IF EMPLOYED:

- LAST 2 PAY STUBS
- W2's OR 1099's FOR THE LAST 2 MOST RECENT YEARS

IF RECEIVING VA DISABILITY:

- VA BENEFITS AWARDS LETTER

IF RECEIVING SOCIAL SECURITY:

- SSA AWARDS LETTER
- LAST 2 MOST RECENT YEARS SSA-1099 FORMS

IF RECEIVING SSI DISABILITY:

- SSI/SSA DISABILITY AWARDS LETTER OR MONTHLY STATEMENT

IF RECEIVING A PENSION:

- PENSION AWARDS LETTER
- LAST 2 MOST RECENT YEARS 1099-R FORMS

IF YOU HAVE OTHER MORTGAGES/HOMES:

- MONTHLY MORTGAGE STATEMENT FOR EACH PROPERTY
- HOMEOWNERS INSURANCE DECLARATION PAGE(S)

IF RECEIVING RENTAL INCOME:

- PROVIDE A MORTGAGE STATEMENT FOR EACH PROPERTY YOU OWN WITH A LOAN ON IT
- PROPERTY TAX BILL FOR EACH PROPERTY YOU OWN
- HOMEOWNERS INSURANCE DECLARATION PAGE FOR EACH PROPERTY
- NOTATE HOW MUCH EACH UNIT/PROPERTY IS RENTED FOR