



***Thank you for doing business with Security State Bank.***

**As we attempt to make your loan process as smooth as possible, please return the items listed below.**

- \_\_\_\_\_ Color Copy of Driver's License & Social Security Card for each borrower
- \_\_\_\_\_ 30 consecutive days of most current pay stubs for each job and each borrower
- \_\_\_\_\_ 2 most recent years W2's and/or 1099R for retirement income
- \_\_\_\_\_ 2 most recent years Tax Returns, Personal, Business and All Schedules
- \_\_\_\_\_ 2 most recent bank statements, all pages required
- \_\_\_\_\_ Contact information of present landlord
- \_\_\_\_\_ Copy of Current Mortgage Statement
- \_\_\_\_\_ Title Company (if Refinance) \_\_\_\_\_
- \_\_\_\_\_ Homeowner's Insurance Agent  
Name: \_\_\_\_\_ Phone #: \_\_\_\_\_
- \_\_\_\_\_ Social Security Income Awards Letter from Federal Gov't.
- \_\_\_\_\_ Pension and / or Retirement Income verification documentation
- \_\_\_\_\_ Divorce Decree and / or Child Support Order all pages required
- \_\_\_\_\_ Gift Letter - **Donor Must** provide documentation of where they acquired the funds. For example, bank statements, check from 401K account, etc.
- \_\_\_\_\_ Sold Property documentation, if sold to qualify or acquire funds to close transactions. Must provide, bill of sale, copy of signed title and verify receipt of funds.
- \_\_\_\_\_ Bankruptcy Papers and Discharge Documents, all schedules
- \_\_\_\_\_ VA Loans Only – Copy of DD214

**IF SELF-EMPLOYED –**

- \_\_\_\_\_ Business Tax Returns for past two years and three months business bank statements
- \_\_\_\_\_ Current Year to Date profit and loss statements (within 60 days) – signed and dated

**Additional Items:**

**These items are voluntary for the pre-qualification process.**