

1419
Burlingame
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Suite R
Fox Mall Plaza
Burlingame
California
94010-4123
Telephone
650/579-2600
Facsimile
650/579-2626



Please provide the following items:

- PAY STUBS THAT COVER - Recent 1 month period.
- W-2s - For most recent 2 years.
- 1040's - PERSONAL TAX RETURNS AND ALL K-1'S - For most recent 2 years.
(include all schedules and all K-1's listed on your tax returns.)
- TAX RETURN EXTENSION - If you have not filed current tax return.

If you own 25% or more of an entity, please provide the following:

- Year to Date PROFIT & LOSS STATEMENT - Sign & Date.
- 1120's - CORPORATE TAX RETURNS - For most recent 2 years.
(Include all schedules)
- 1065's - PARTNERSHIP TAX RETURNS - For most recent 2 years.
(Include all schedules and K1s)
- Copy of recent 2 month's bank statements (**ALL PAGES**) on major asset accounts. *(Please copy ALL PAGES, front and back.)*
- Copy of Driver's License(s).
- Copy of the declaration page of home ins. for all properties owned OR contact info for your ins. agent.
- Copy of a recent mortgage statement for your existing 1st loan.
- Copy of a recent mortgage statement for your equity line of credit or 2nd loan if applicable.
- Landlord name, address and telephone number.
- Copy of the NOTE/LOAN AGREEMENT for your equity line of credit (**ALL PAGES**).
- Name and phone number of your Homeowners Association.
- Current Social Security and/or Retirement Benefit Award Letter(s).
- 1099-R(s) for years 2014, 2015 and 2016.
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If there are any additional concerns, we're here to assist you.