

1419
Burlingame
Avenue

Suite R
Fox Mall Plaza

Burlingame
California
94010-4123

Telephone
650/579-2600

Facsimile
650/579-2626



Dear Borrower(s):

The following Documents are enclosed for your signature and/or Completion:

- Loan Application
- Authorization Form – Signatures (s) Only
- eConsent Form – need email address and signature(s)

In additional to the above reference items, please provide the following:

- Paystubs covering the past 30 days
- W2(s) for the most recent 2 years
- 1040 Personal Federal Tax Returns for the most recent 2 years *(including all statements, schedules and K-1s)*

If self-employed, please provide the following:

- Year to Date Profit & Loss Statement and Balance Sheet – sign and date
- 1120 or/and 1120S Corporation Tax Returns with all pages for the most recent 2 years *(need tax return(s) if K1(s) shows interest 25% of more)*
- 1065S Partnership Tax Return(s) with all pages for the most recent 2 years *(need tax return if K1(s) shows interest 25% or more)*

- Copy of the most recent 2 months bank statements with all pages *(All assets to be used for this refinance/ purchase transaction)*
- Landlord name, address and telephone number
- Copy of rental agreements on all properties
- Copy of Purchase Agreement and Escrow Deposit Receipt
- Copy of the most recent mortgage statement(s) for all properties
- Copy of the Note for the property at:
- Copy of Homeowner's Insurance(s) showing the coverage, premium and insurance agent contact information for all properties
- Copy of Driver's License(s)
- Other:
- Other:
- Other:

Thank you for the opportunity serving you!