



**The Zeigler & Alvarez Team**  
**Building "Clients for Life"**  
**— Greystone Financial Group —**

**Please bring in the following items to your loan application appointment.**  
**All items are required for both borrowers to process and approve your loan (refinance).**

1. Complete addresses (including Zip codes) of present and former residences for the **past two years**.
  - If you are renting, include the name, address and telephone number of all of your landlords for the **past two years**.
2. Copy of Driver's License and Social Security card.
3. Present and former employers, including telephone numbers, address and zip codes for the **past two years**.
4. Your **most recent** paycheck stubs for all employment to cover one month's earnings.
5. If self employed, the complete 1040's for the **past two years**.
  - Complete K-1s or partnership returns (if applicable) for **past two years**.
  - Corporate tax returns (if applicable) for the **past two years**.
  - **Year to date** profit & loss plus balance sheet.
6. Documentation of any other income such as Social Security, retirement, court ordered child support, disability, interest, etc.... Bring award letter or other documentation showing amount you receive.
7. Most recent mortgage statements (make sure there is a phone number on statement)
8. All bank accounts, **last two months statements**
9. Stocks, Bonds, IRA, and 401K with account numbers, the name and address of every broker or firm.
  - Or the last two statements if monthly or last statement if quarterly.
10. **Tax Returns** for both 2006 and 2007 and **W2s** for 2006, 2007
  - \* If you do not have 2007 W2 please bring in your final 2007 pay stub with Year to Date on it.
11. Home Owner's Insurance Company and your Agents name & number.
12. Information of Real Estate sold within the **last 12 months** (HUD- Settlement Statement).
13. Complete addresses to all Real Estate owned, including the year it was acquired, servicing company, loan balance, payment amount and current market value.
  - If rental properties, supply all **rental agreements**. If property is pending sale supply a copy of the sales contract.
14. If you have been through a bankruptcy, bring all legal documents and discharge schedules.
15. If divorced or legally separated, include a copy of the divorce decree or separation agreement.
16. For VA loans: Copy of DD 214 (showing discharge status)
  - Original certificate of eligibility (if available)
  - If previously used VA eligibility, bring previous address & loan number.
  - Address and phone number of nearest relative (not living with you)

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