

## Supporting Documentation Checklist for Purchase Transactions

Thank you for considering Foundation Mortgage to represent you for your home financing needs. In order to help ensure that the process goes smoothly, I've put together the following general checklist to assist you in the preparation of the supporting documentation for your loan.

If you have any questions regarding the items listed below and how they apply to your particular transaction, please feel free to contact me. I look forward to the opportunity to work with you!

### Documentation Requirements:

- Driver's License:**
  - The easiest way to get us a legible copy is to take a picture with your smart phone and email it to me.
- Social Security Card Or Passport:**
  - The easiest way to get us a legible copy is to take a picture with your smart phone and email it to me.
- Most Recent 2 Paystubs:** (covering the last 30 days consecutive. Paystubs need to show year to date earnings).
- W2s – To Match Tax Returns Provided – ie. 2020 & 2021 – But if providing 2019 Tax Returns please also provide the 2019 W2.**
  - W2s are a part of a complete tax return and the lender will request to see all the W2s filed with each return you are providing.
  - This includes w2s for a non-borrowing spouse if they are on the returns filed.
- 2019 & 2020 or 2020 & 2021 Filed Personal Tax Returns:**
  - Include all pages/schedules filed with each return.
  - Make sure that the tax return is signed
  - If the current tax year is on extension. Please provide a copy of the extension and the prior 2 years filed returns.
- All K1s associated with the personal tax returns being provided.**
- 2019 & 2020 Business or 2020 & 2021 Tax Returns for any business with 25% or greater ownership & YTD P&L and Balance Sheet.**
- Most Recent 2 Months Bank Statements**