



HOUSING REHAB LOAN PROGRAM HOMEOWNER DOCUMENTATION CHECK LIST

REQUIRED INCOME DOCUMENTATION

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| ____ Completed application | _____ Interest |
| ____ 8 Weeks of Pay stubs or letter | _____ Alimony |
| ____ Unemployment-Monetary Determination/Weekly deposits | _____ Foster Care |
| ____ Veteran's Benefits/Current Year Letter | _____ Worker's Comp. |
| ____ Social Security/Current Year Benefit Letter | _____ Non-Income |
| ____ Pension (2Mo.s Statements or 1099 if no statements) | _____ Other Income (Explain) |
| ____ Child Support (Divorce Decree) | |
| ____ Bank Statements – Checking & Savings (2Mo.s Recent Statements, all pages) | |
| ____ Investment Account Statements (2Mo.s Recent Statements, all pages) | |
| ____ IRAs & 401Ks Account Statements (2Mo.s Recent Statements, all pages) | |

REQUIRED SUPPORTING DOCUMENTATION

- ____ Copy of the property Deed
- ____ 2 most recent years 1040 IRS TAX RETURNS signed & filed.
- ____ 2 most recent years SELF-EMPLOYED – **Schedule C** ____ 2 most recent years INCOME FROM RENTAL – **Schedule E**
- ____ 2 most recent years IRS **TAX RETURN** TRANSCRIPTS. Forward to TRI upon receipt (see instructions)
- ____ Copy of First two pages of Mortgage
- ____ Copy of First two pages of Home Equity
- ____ Copy of Entire Reverse Mortgage Doc.
- ____ Copy of most recent Loan Statement of a Reverse Mortgage
- ____ PROOF OF PAID PROPERTY & FLOOD INSURANCE (**PROOF FROM INS. CO.**)
- ____ PROOF OF PAID REAL ESTATE TAXES (**PRINT OUT FROM THE TOWN REQUIRED**)
- ____ Complete copy of Trust Documents – if applicable
- ____ Complete copy of Condo Documents – if applicable

**** PLEASE NOTE W-2s, 1099s, YEARLY SUMMARIES UPON REQUEST ONLY