



1224 Columbia Avenue Building B, Suite 100
Franklin, Tennessee 37064
Phone: 615-599-2101
Fax: 615-599-2390

PURCHASE CHECKLIST

Please provide the following documentation in order to expedite to processing of your application:

- Copy of fully executed contract of sale.
- Provide name and number for your attorney and contact person for appraisal report.
- Provide past two years W-2 forms
- Provide one months most recent consecutive paystubs for all applicants.
- If you are self employed, commission or if your overtime exceeds 25 % of your total income, please provide past years business and personal tax returns (ALL Schedules) along with the name and telephone number for your accountant.
- Provide most recent past two months bank statements for all bank accounts.
- If you currently rent a home, provide name and address of your landlord so that we may mail a verification of rent form (or) 12 months cancelled rent checks (front and back)
- If you currently own a home that you will be selling or has sold, please provide either contract of sale or closing statement. If you will be leasing this residence, provide copy of fully executed lease.
- Copy of all applicants drivers license and social security card/resident alien card.

REFINANCE/HELOC CHECKLIST

Please provide the following documentation in order to expedite to processing of your application:

- Copy of most recent mortgage payment coupons for all mortgages
- Provide copy of existing homeowner insurance binder
- Provide past two years W-2 forms.
- Provide one months most recent consecutive paystubs for all applicants.
- If you are self employed, commission or if your overtime exceeds 25 % of your total income, please provide past years business and personal tax returns (ALL Schedules) along with the name and telephone number for your accountant.
- Provide most recent ·past two months bank statements for all bank accounts.
- Copy of current deed, survey and c/o