



## Underwriting Requirements

### All Applicants:

---

- Completed and signed **Loan Application** for all applicants and persons having ownership in the asset.
- Legible copies of each applicant's **Driver's License or Passport**
- Completed, signed and dated **Personal Financial Statement** (not older than 60 days)
- **Bank and Brokerage Statements** supporting liquid assets as disclosed on the PFS (not older than 30 days)
- Copies of recent **Bank Statements and Brokerage Account** (not older than 60 days).
- Two most recent **Personal Tax Returns** for each applicant (include all schedules: *A through E and all K-1's*)
- Two most recent **Paystubs** (not older than 30 days)
- Include most recent **W2(s)** where current year personal tax return has yet to be filed

### Self-Employed Applicants:

---

- Two (2) years **Corporate Returns** (1120, 1065 or 1120S - include all K1s where applicable)
- **Current Balance Sheet and Profit and Loss Statement** (not older than 90 days)
- Brief description and history of the business(s)