



Reverse Mortgage Checklist

My goal is to help you obtain a loan that best suits your needs. In order to do so, it's important that you promptly provide the documents listed below.

Personal Information

- A copy of your Counseling certificate - signed by all parties
- Loan Application & C.card Authorization - we can complete these together
- Please have your driver's license AND social security card OR Passport on you, I'll need take a picture of these items when we meet (for all borrowers)
- A copy of your Trust (all pages needed for lender to review) - if applicable

Verification of Income

- Pay stubs for the last 30 days - for all borrowers
- Tax Returns (Federal only) with all schedules - for the past 2yrs
- W-2 and 1099 forms - for the past 2yrs
- Additional income: S.Security award letter, pensions, veteran's benefits, alimony, child support...etc.

IF Self-Employed, also provide

- K1's - for the past 2yrs
- Business Tax Returns - for the past 2yrs

Assets & Debts

- 2mo. most recent bank statements-ALL pages (even the junk/back pages)
- Most recent quarterly financial statements: i.e., Charles Schwab, Merrill Lynch...
- Most recent quarterly investment statements: i.e., 401k, TSP
- Most recent mortgage statement-for your current mortgage(s)
- A copy of your current home insurance policy

I look forward working with you & for you!

Joely (858) 337-1026 MyLoanMyHome.com

Brokered by-  C2 Financial Corporation

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