



## Mark Maimon

Mortgage Branch Manager

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A DIVISION OF



# DOCUMENTS NEEDED FOR PRE-APPROVAL

Follow the list below that most accurately describes your employment arrangement.

It's possible we may discover additional items needed during our consultation call, but the list below is a good starting point. After you complete the online application, you will be able to upload your documents to our portal.

## Company/Salaried Employees

- Complete online loan application
- 2 most recent pay stubs
- 2 most recent years of W-2s and federal tax returns (all pages)
- Proof of your last 2 years of bonus/commission income
- Proof of your last 2 years of RSU income & vesting schedule
- 2 months of bank/investment/retirement account statements
- Mortgage/Tax/Insurance/HOA statements for all properties owned

## Sole Proprietors/Freelancers/Single-Member LLCs

- Complete online loan application
- 2 most recent years of personal federal tax returns (all pages)
- Profit and loss statement for the period since your last tax filing
- 2 months of bank/investment/retirement account statements
- Mortgage/Tax/Insurance/HOA statements for all properties owned

## Business Owners/Partnerships

- Complete online loan application
- 2 most recent years of W-2s and K-1s (as applicable)
- 2 most recent years of personal federal tax returns (all pages)
- 2 most recent years of corporation federal tax returns (all pages)
- Profit and loss statement for the period since your last tax filing
- 2 months of bank/investment/retirement account statements
- Mortgage/Tax/Insurance/HOA statements for all properties owned

## Other Items (As Applicable)

- Award letter for social security, pension, government benefits, etc.
- Divorce decree/separation agreement
- Trust agreement/LLC documentation (if holding title in a trust/entity)
- Unexpired ID (driver's license, passport, green card or visa)
- Purchase contract (if available)