



Dear ,

Thank you so much for the opportunity to let Mark consult with you on what is going on in the market today. In order to get your loan approved quickly by any lender, it is required to get all of the necessary information and documentation in the beginning of the loan process. Below is a list of the documentation that Mark will need in order to get your loan approved, should you decide to move forward with our company.

1. 2 months worth of most recent bank statements (all pages)
2. 2014 Social Security Awards letters (If Applicable)
3. Awards letters for Pension (If Applicable)
4. One month's worth most recent pay stubs
5. 2013 and 2014 w2's or 1099's
6. 2013 and 2014 personal tax returns (All schedules)
7. 2013 and 2014 K-1's (If Self Employed)
8. 2013 and 2014 Partnership 1065/corporate 1120 with all schedules (If Applicable)
9. Most recent mortgage statement
10. Mortgage statement for your 2nd (If Applicable)
11. Note and deed of 2nd mortgage (If Applicable/If Subordinating)
12. Most Recent Property Tax Bill (All properties)
13. Home Owners Insurance Declarations Page
14. HOA Bill (If Applicable)
15. Copy of Drivers license
16. Copy of Social Security cards
17. Trust documentation (If Applicable)
18. Rental Agreements (If Applicable)

Please let me know if you have any questions.

Sincerely,
Mark Gallagher
Personal cell (949) 540-2300

BRE License# 01883363 Licensed by the California Department of Real Estate.