



Coco Tan, MBA, Realtor

****Award Winning Luxury Home Specialist****

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\$200 Million Sold

Materials Required for Starting the Loan Process

- Signed BayCal Loan Application
<http://www.RealtorCocoTan.com/docs/loanapplication.pdf>
- 2 Years of Tax Returns, W2's for Salaried Employees and 1099's for Self-Employed/Business Owners
- 2 months of bank/stock/401K/IRA statements (all pages, single sided please)
- 1 month of paystubs
- Copy of Driver's License
- \$29 for the credit report
- If currently owning properties, for all properties owned:
 - Copy of all Mortgage Statements (including equity lines, if any)
 - Copy of Property Tax bill
 - Copy of Hazard Insurance declaration page
 - HOA contact information, if any
 - Rental Agreements, if applicable

Additional Items for Purchase Loans:

- If currently in contract to purchase a property:
 - Copy of purchase contract
 - Escrow Information (escrow officer name, phone number, escrow number), Preliminary Title Report
 - Realtor information (name, phone number)