



Mortgage Application Checklist

Thank you for choosing Vision Mortgage Company, Ltd. for your mortgage lending needs. The following is a checklist of the documents needed to support your loan application. We ask that you return these items along with the completed, signed/initialed Uniform Residential Mortgage Loan Application (see Application).

- ❑ **\$32.50+/- payment for tri-merged credit report.** The credit report will be ordered as soon as payment has been received. Payment may be made by check or credit card. (Visa or MasterCard accepted –see authorization). You will be provided a copy of your credit report.
- ❑ **W-2 forms** for the two most recent years. (K-1 Statements where applicable)
- ❑ **Tax Returns** (*all pages*) for the two most recent years (Personal & Corporate if applicable)
- ❑ **Pay stubs** for the most recent 30 days.
- ❑ **Self-employed** - you will need to provide the following:
 - ❑ Tax Returns (*all pages*) for the two most recent years –Business & Personal
 - ❑ Year-to-date Balance Sheet
 - ❑ Profit & Loss statement within the last 60 days.
- ❑ **Bank and/or Asset statements**, including 401K or IRAs for the last 90 days. *All pages.*
- ❑ **Clear copy of a Government Issued ID** i.e. Driver’s License, Passport, SS Card.
- ❑ **VA Borrowers** - please also include a copy of the following:
 - ❑ DD214 Discharge Document and VA Entitlement Certificate , if available
- ❑ **Refinance Loans** – please also include the following:
 - ❑ The most current mortgage coupon.
 - ❑ Your most recent property survey (if applicable).
 - ❑ The closing statement from your current loan.
- ❑ **Insurance:** Address and contact information for your insurance agent.



Credit Authorization & Acknowledgement

I/We the undersigned herein expressly authorize Vision Mortgage Company, Ltd. [Broker] to obtain a copy of our credit report in conjunction with qualifying for a home loan. The below given credit card information is given solely for ordering a report now. I/We understand that if we give our **Intent to Proceed** notification, Broker will incur expenses in our behalf that relate, but are not limited to, appraisal charges, survey, legal, and other similar loan related charges for which we will be responsible. I/We understand that we will be given payment options for those fees prior to their incurrence.

Credit Account Number: _____ **Expires:** ___/___ **Security Code** _____

Billing Address: _____

It is agreed and understood that credit card use will be restricted to charges for services performed and only with prior authorization and acknowledgement by the undersigned party.

Email address: _____

Cardholder’s Signature _____ **Date** _____

All information may be returned to **Vision Mortgage Company, Ltd.** either in person at your scheduled appointment, or your choice of the following:

Mail: 7800 IH 10 West, #112, San Antonio, TX 78230

Fax: 210-348-0542

Email: abarbosa@satx.rr.com, sandybarbosa@sbcglobal.net, or jbarbosavmc@gmail.com