

LEGEND LENDING

THE WOODLANDS

713.221.7370

Documents needed for your loan application

A simple checklist to help you prepare before you apply.

PLEASE NOTE

Not all documents required will apply to you. Provide what you feel is applicable and feel free to call us with any questions!

START HERE

Core documents

- ☒ MOST RECENT TWO MONTHS OF BANK STATEMENTS, ALL PAGES.
- ☒ MOST RECENT 30 DAYS OF PAYSTUBS.
- ☒ MOST RECENT 2 YEARS OF W2'S, 1099'S, K1'S AS APPLICABLE.
- ☒ MOST RECENT 2 YEARS OF FILED PERSONAL AND BUSINESS TAX RETURNS AS APPLICABLE.
- ☒ FOR REAL ESTATE HELD THROUGH BUYING YOUR NEXT HOME, A COPY OF THE CURRENT MORTGAGE STATEMENT(S) (OR DEED IF NO MORTGAGE), COPY OF THE CURRENT INSURANCE DECLARATION PAGE, STATEMENT OF ACCOUNT FROM HOA TO VERIFY DUES (IF APPLICABLE). IF RENTED, A COPY OF THE CURRENT LEASE.
- ☒ ONE FORM OF VALID GOVERNMENT ISSUED PHOTO ID.

IF APPLICABLE

Additional documents

- ☒ IF APPLYING FOR VA FINANCING, A COPY OF YOUR CERTIFICATE OF ELIGIBILITY & YOUR DD214.
- ☒ IF PURSUING A BANK STATEMENT LOAN, THE MOST RECENT 12-24 MONTHS OF BANK STATEMENTS
- ☒ IF CHILD SUPPORT OR ALIMONY IS RECEIVED OR PAID, PROVIDE COURT ORDER OR DECREE TO VERIFY TERMS.
- ☒ FOR SOCIAL SECURITY AND OR PENSION INCOME, PROVIDE THE MOST RECENT AWARD LETTER RECEIVED.
- ☒ FOR IRA AND OR INVESTMENT INCOME, PROVIDE EVIDENCE OF RECEIPT OF THE INCOME FOR THE PAST 1-2 YEAR AND A COPY OF THE ACCOUNT TO SUPPORT A SUFFICIENT BALANCE TO CARRY FOR THE NEXT 3 YEARS.
- ☒ IF SELF-EMPLOYED, YOU MAY ALSO BE ABLE TO QUALIFY USING 12 MONTHS OF BUSINESS BANK STATEMENTS. PROVIDE THEM IF YOU WOULD LIKE US TO CONSIDER THIS OPTION.



READY TO SEND YOUR DOCUMENTS?

Upload documents securely through the application portal:
<https://sonyabersanimortgages.loanzify.io/login>

QUESTIONS? CALL US

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