

**Customer Check List**  
**Gershman Mortgage**  
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Springfield, MO 65804 Web Site - [www.jerrypeterie.com](http://www.jerrypeterie.com)  
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To: \_\_\_\_\_ From: Jerry Peterie

Thank you for choosing Midwest Lending Source to provide you with your mortgage needs. Please return the Loan Application, Good Faith Estimate, Authorization Form along with the items identified in the check list below.

The Following is what we discussed: Loan Amount \$ \_\_\_\_\_

Interest Rate: \_\_\_\_\_ Term: 30 year Fixed Org. Fee: \_\_\_\_\_

Discount Fee: \_\_\_\_\_

You may request a rate lock after your application and credit is reviewed.

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- Copy of recent mortgage statement (showing payment, escrow account and unpaid balances).
  - \_\_\_\_\_ Complete two year work history, (employer's name, address and phone number)
  - Most recent pay stubs for a 30 day period.
  - Last two year's W-2's                      2014                       2013
  - Last two year's federal income tax returns (all schedules) personal and business (if self employed or commissioned employee)
  - Current year to date profit and loss statement. (If self employed)
  - Last two year's 1099's for any retirement, pensions, annuity and social security incomes.
  - Checking accounts (last two months statements)
  - Saving accounts (last two months statements)
  - Other sources of income; CD's, stocks, mutual funds, retirement accounts, 401k, etc.
  - Investment properties owned, (need signed lease / rental agreements)
  - Two years residence history (**including landlord's name, address and phone number**)
  - Copy of full divorce decree (including all exhibits) IF APPLICABLE
  - Copy of bankruptcy papers IF APPLICABLE
  - Please sign and return initial Good Faith Estimate and all other misc. disclosures.
  - Homeowner's insurance Info (including agents name and phone number).
  - \_\_\_\_\_ Copy of land survey (if available).
  - \_\_\_\_\_ Real Estate Agent Information: Name, Company, Phone, and Cell Phone number
  - \_\_\_\_\_ Title Company Information: Name, location, contact and phone number
  - Other: Photo Copy of Drivers License and Social Security Card

I want to thank you again for choosing Midwest Lending Source. To ensure a speedy process, please RE-CHECK to verify your package is complete. You may express mail or mail your package to the above address or call and a representative from our office will pick it up.