



2037 Harrison Avenue Eureka, CA 95501

Phone (707) 445-3027

Fax (707) 445-3028

bob@humboldtmortgage.net

www.humboldtmortgage.net

Checklist of Items Needed Reverse Refinance

Date: _____

Name(s): _____

Email(s): _____

(Please provide)

Dear Prospective Borrower(s):

Items Needed

___ \$25.62 for a single's credit report; \$45.54 for a couple's report (Please provide credit card information)

COPIES of the following documents:

___ Recent pay stub(s) for 30 days (If paid every 2 weeks, copy three stubs)

___ Last 2 years W-2 forms and/or 1099

___ If receiving social security or retirement income provide most recent award/benefit letter

___ Most-recent tax returns (FEDERAL ONLY), covering two years (ALL PAGES)

___ Last 2 months bank statements, personal only (ALL PAGES)

___ Driver's license or state-issued identification card

___ Social security card or Medicare card

___ Your most-recent mortgage statement(s)

___ Current declaration page(s) of fire insurance policy, showing annual premium and name of insurance agent

___ Current property tax bill(s), showing annual payment amount

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Borrower Name: _____

Borrower Date of Birth: _____

Borrower Social Security Number: _____

Co-Borrower Name: _____

Co-Borrower Date of Birth: _____

Co-Borrower Social Security Number: _____

In order to expedite your loan process, please provide ALL of the documents listed on the checklist. You may submit them by email, fax, mail or drop off at the office. Please provide copies only. If you own more than one property, please include the requested documents for all properties.

In addition to the checklist documents please provide a 2-year employment history for with the following information:

- Borrower:
- Employer Name:
- Local Physical Address:
- Dates From: To:
- Monthly Income:
- Position:
- Business Phone:
- Phone number and Fax number for Human Resources:

- Co-Borrower:
- Employer Name:
- Local Physical Address:
- Dates From: To:
- Monthly Income:
- Position:
- Business Phone:
- Phone number and Fax number for Human Resources:

We are excited to work with you and look forward to helping you navigate the process of getting a home loan. Please call us if you have any questions.

Thank you,

Bob Lawton

Broker/Owner

CalBRE: 01144618, NMLS: 323296



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CREDIT CARD AUTHORIZATION FORM

I, _____, hereby authorize **Humboldt Mortgage Company** to use the following credit card for payment of Credit Reports as are applicable to process my mortgage loan transaction. Any related credit report charges for the next 90 days are authorized to be applied to this card.

Visa

MasterCard

Discover

Amex

Card #: _____ Expiration Date: _____

Security Code: _____

Cardholder Name (as it appears on card): _____

Billing Address: _____

Borrower/Cardholder Signature

Date