



To fax or email your documents:

Contact your Heritage Success Realty agent direct for your property specific email address or their fax number

In order to have the opportunity to negotiate with your lender we will need to have the following documentation. Please note, when we get a contract we may need updates on each item so please make certain you set aside statements and paycheck stubs as you get them.

HOMEOWNER'S DOCUMENT CHECKLIST

- Two months most recent mortgage statements (all mortgages)
- Two months checking account statements (all borrowers if separate)
- Two months saving account statements (all borrowers if separate)
- Last two paycheck stubs (all borrowers) or if self employed 2 months P & L
- Two years tax returns
- Hardship Letter
- Financial Worksheet (we can provide)
- Authorization to speak with your lender (provided)
- Other _____
- Other _____
- Other _____

If you do not have paystubs, last year's tax return or bank statements we can provide a statement form for you to sign or you may write your own statement explaining why you do not have these items and sign and date it.