



Single Family Residence Preliminary Needs List

Fidelity Bancorp Funding, Inc. (FBF) would like to thank you for the opportunity to assist in your financing needs. We strive to provide you with the best service available to close your transaction expeditiously. Please find our checklist below with items you will need to provide. **Any forms can be found in the FORMS section of our website.**

- _____ Loan Application (1003) - complete and sign
- _____ Schedule of Real Estate Owned (SREO) form – provide on FBF form
- _____ Credit Card Authorization form to order the appraisal and credit
- _____ Applicant's Authorization to Release Information for credit report – complete and sign on FBF form
- _____ Clear copy of your current California Driver's License
- _____ Copy of your Social Security Card
- _____ Copy of Social Security Award Letter and Pension letters, if applicable
- _____ One month current paycheck stubs
- _____ Two years current **Federal** Tax Returns and W-2's
- _____ If self employed and filing business separately, include two years current Business **Federal** Tax Returns, K-1's, and year-to-date Profit and Loss statement
- _____ Two months current bank and investment statements (all pages)
- _____ Copy of all current mortgage coupons and Insurance Declaration page for **ALL** properties owned
- _____ Name and phone number of your Insurance Agent for the subject property
- _____ Signed explanation for any AKAs or Derogatory Credit accounts

To process your loan efficiently and to obtain loan approval, we advise you to continue making your mortgage payments and pay bills on time. In addition, refrain from any major purchases that could affect your credit, such as a new vehicle etc., until the loan is completed. Please do not make any large deposits into your bank account. The funds brought to ESCROW must come from an account we can verify.

*Thank you for your business and do not hesitate to contact us with any questions.
We look forward to working with you.*