



## ***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.*