

# MORTGAGE PORTFOLIO PROGRAM

## SUBMISSION/PRE-APPROVAL CHECKLIST & PROCESS OVERVIEW

We appreciate your business and thank you for the opportunity to provide mortgage financing to your clients. If you have any questions regarding required documents or the submission process, please contact your Account Executive.

### SUBMISSION CHECKLIST:

Please email these items to your Account Executive.

- Complete 1003 & 1008 (All liquid assets should be listed separately from retirement funds)
- Fannie Mae 3.2 File
- Credit Report (dated within 30 days)
- Complete Asset Statement(s) (dated within 30 days)
- Condominium or Co-op Questionnaire (if applicable)
- Executed Purchase Contract (if applicable)
- Income Documentation

#### Wage Earner

- Most recent W2 statement(s)
- YTD pay stub dated within 30 days
- Asset depletion calculator if applicable

#### Self-employed

- Prior two years personal & business tax returns with all schedules
- Current YTD P&L
- Asset depletion calculator if applicable

#### Expatriate/Immigrant

- Copy of contact or offer letter
- Copy of work visa
- Asset depletion calculator if applicable

### PRE-APPROVAL PROCESS OVERVIEW:

Rush closings are available. Please contact your Account Executive for details.



### CONTACT INFORMATION

888.876.2328 | 214.880.9549 fax  
loans@advancialmortgage.com



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Mortgage loans are originated by Advancial Federal Credit Union NMLS 469500