

## Your personalized document list

These are the forms that must be completed and signed by everyone listed on the loan. Additional documentation may also be required. **Please provide copies and keep all originals for your records. Be sure to write your loan number on each document.**

### **Please provide all of the following:**

#### **Required from each borrower:**

- **Request for Mortgage Assistance (RMA)**
- Signed copy of your most recent federal tax return (all pages) or **IRS Form 4506-C: Request for Transcript of Tax Return**
- **Two most recent, consecutive bank and brokerage statements (all accounts and all pages)**

#### **Please also provide the necessary documentation for the type of income you receive:**

*If your loan is from your state's Housing Finance Agency, please call your Customer Relationship Manager to understand which documents you need to submit.*

#### **If you receive a salary or hourly wage:**

- **Your most recent pay stub**

#### **If you are self-employed (single or multiple businesses):**

- One of the three following documents:
  - Most recent signed and dated quarterly Profit and Loss Statement showing activity for the three most recent months
  - Most recent signed and dated year-to-date Profit and Loss Statement showing activity for the three most recent months
  - Bank statements for the two most recent months of business showing that business activity is continuing (all pages)

#### **If you receive non-wage income such as part-time employment, bonuses, tips or investment income:**

- Documentation describing the specific source and amount of income, such as an employment contract or printouts documenting tip income

- Documentation, such as bank statements (all pages), showing that you received this income for at least one month

**If you are on active military duty or within 12 months after release:**

- Copy of active duty, military orders or other proof of active duty status that shows the start date
- Most recent Leave and Earnings statement that may include flight or hazard pay, rations, clothing allowance, quarters/housing allowance and proficiency pay

**If you receive unemployment benefits:**

- Either a copy of the benefits statement or letter from the provider that states the amount, frequency, and duration of your benefit
- Or documentation, such as bank statements (all pages), showing that you received this income from this source for at least one month

**If you receive alimony, child support or separation maintenance:\***

- Divorce decree, separation agreement, or other written agreement filed with the court, or decree that states the amount and period of time over which the payment will be received. Your documentation must show that the payments will continue for at least 12 months
- Two most recent months of bank statements (all pages) showing that that you received these payments

*\*You are not required to disclose alimony, child support or separation maintenance unless you wish to use those funds to help you qualify for assistance.*

**If you receive rental income:**

- Complete Section 5 of the Request for Mortgage Assistance and provide:
  - All current rental agreements
  - Documentation, such as bank statements (all pages), showing that you received these rental income payments for at least one month

**If you receive Social Security, disability or death benefits, pension, adoption assistance or public assistance:**

- Either a copy of the benefits statement or letter from the provider that states the amount, frequency and duration of the benefit
- Or documentation, such as bank statements (all pages), showing that you received this income from this source for at least one month

## Related Documents:

[Profit & Loss Statement](#)

[Third-Party Authorization for FHA](#)

[Third-Party Authorization VA/USDA \(Rural\)](#)

[Third-Party Authorization for Friends & Family](#)