



## ITEMS NEEDED LIST

In addition to the documentation listed within each loan category (conventional, VA, jumbo, etc), self-employed borrowers will need to provide the following:

**SOLE PROPRIETORS (SCH C)** – in addition to your two most recent filed personal tax returns, please provide the following:

1. YTD Profit and Loss Statement and Balance Sheet thru most recent quarter
  - a. If you have not filed 2015 returns, provide the above for 2016 YTD *AND* all of 2015

**CORPORATIONS (1120S and 1064)** – if you are more than 25% owner of any business, per your K-1 statement, please provide the following for each entity:

1. 2015 and 2014, or 2014 and 2013 full tax returns and applicable extension
2. YTD Profit and Loss Statement and Balance Sheet thru most recent quarter
  - a. If you have not filed 2015 returns, provide the above for 2016 YTD *AND* all of 2015