

# SAMMAMISH MORTGAGE DOCUMENTS CHECKLIST

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Get your loan application approved easily.

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## Helpful tips to ensure a smooth loan process:

- All documents can be uploaded through our Secure Inbox
- Send copies or PDF's of actual statements and documents rather than screen shots, overview, or photos.
- Numbered pages require ALL numbered pages on statements, even if blank.
- Tax returns require all federal schedules and please sign and date page 2 of your 1040s if not already.
- Uploading all at once is much easier to execute the process.

## Documents Needed For Preapproval

- Complete loan application
- Last 2 years W2's for all borrowers
- Last 2 years 1040 federal tax returns (all schedules)
- Most recent pay-stubs covering 30 days, all borrowers
- 2 months most recent personal bank statements, all pages (please no screen shots)
- Most recent quarterly or monthly asset statement(s) such as 401k, investments, checking/savings, etc. - all pages (if showing on the loan application)

## Additional Documents Likely Needed For Full Loan Approval

- Homeowner's insurance dec. page and most recent mortgage statement if applicable.
- Copy of identification for each borrower (driver's license or passport, etc.)
- If applicable: Retirement/Pension/SS income: Last 2 years 1099s. Award letter for current year SS income and/or continuance letter for pension/retirement confirming terms and timelines of future wages.
- If applicable: Rental properties: Address, value, loan balance, payment break-down and if taxes/insurance included. Please send most recent mortgage, property tax, insurance, and HOA statement as applicable for each property.
- Debit/Credit card information for ordering appraisal (collected during the loan process after we have sent you loan disclosures)

## If Self-Employed – Please Add:

- Last 2 years corporate tax returns, all schedules (if applicable)
- Last 2 years 1099's (if applicable)
- Last 2 years K-1's (if applicable)

## For VA Financing:

- Copy of your DD214 if separated from the military (see below for instructions to request if you do not have a copy)
- Completed Request for COE form 26-1880
- Statement of service from your commanding officer if you are active duty
- Your Certificate of Eligibility (COE). Your Loan Consultant can help you get this.

# Requesting Your DD-214

## Digital Express

If you need your DD-214 quickly, you should request the services of a DD-214 express service. There are numerous services found online, and there is usually a fee associated. But if you need your DD Form 214 in a hurry, expedited service is a great option.

## Request your DD-214 online

If you don't need your DD-214 right away, you can request it online directly from the National Personnel Records Center (NPRC). This option allows you to complete the necessary information online through eVetRecs, NPRC's online request system.

## Request the DD-214 by fax

You can also request DD-214 duplicate copies directly from the National Personnel Records Center by faxing a completed and signed SF-180 form to fax number 314-801-9195.

## Mail in your request

Mail a written request for your DD214 to:

National Personnel Records Center  
Military Personnel Records  
1 Archives Drive  
St. Louis, MO 63138

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(800) 304-6803

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