



Mount **Diablo** Lending

Retiree Document Requirement List

- Last 2 years Federal Tax Returns (all pages of tax return)*
- Last 2 years of 1099's (all 1099s required)*
- Social Security Award Letter (most recent year)*
- Last 2 Months Bank Statements for all accounts (all pages even if blank)*
- Last 401K/Retirement/IRA statement, all pages*
- Insurance declaration page or copy of insurance statement (home owner's insurance) for all properties owned*
- Copy of your mortgage coupon or statement (can be obtained online) for all properties owned*
- HOA Statement (if applicable)*

Extremely important, ALL documents must be uploaded before your file can be moved to the processing department.