



*You can't be the best,
if you're only the same.*

Loan Application Checklist

All Applicants:

- Current pay stub for all applicants
- Copy of current form SSA-1099 for receipt of Social Security
- Current bank statements, dated within 30 days of application. (All pages for each account: savings, checking, etc.)
- Current monthly statement for mutual funds, retirement accounts, IRA's, stocks, etc dated within 30 days of application. (All pages)
- Completed and signed Uniform Residential Loan Application
- Addendum to Uniform Residential Loan Application
- Completed and signed Insurance Coverage
- Signed Authorization to Release
- Signed Notice Regarding Your Application
- Request for Transcript of Tax Return (form 4506-T)

If purchasing include the following:

- Offer to Purchase with all Counters and Amendments

If new construction include the following:

- Copy of Plans, Specs & Building Contract
- Information on Purchase of Land

If refinancing include the following:

- Current property tax bill or recent appraisal
- Current Homeowners Insurance including the agent name, phone number, and premium amount
- Current monthly statement for mortgage account
- If applicable, copy of existing home equity loan or note agreements

If first time home buyer include the following:

- Name, address and phone number for current and previous landlord

If self-employed include the following:

- 2008 Personal Federal Tax Returns (Including W2's) (Full Tax Returns)
- 2007 Personal Federal Tax Returns (Including W2's) (Full Tax Returns)
- 2008 Corporate Federal Tax Returns (including all schedules) (Full Tax Returns)
- 2007 Corporate Federal Tax Returns (including all schedules) (Full Tax Returns)
- Year-to-Date Profit and Loss Statement and Balance Sheet

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