

Document Request Template

Guide clients through the loan application process and ensure all necessary items are collected upfront.

Document Request Template

A Comprehensive Guide by The Housing Assistant



Use this professional document request template to guide clients through the loan application process and ensure all necessary items are collected upfront. Organized documentation helps reduce delays and ensures smooth file processing.

Document Type	Description	Example
Identification	Government-issued photo ID	Driver's License or Passport
Income Verification	Most recent paystubs (30 days) and W-2s (2 years)	Paystubs + W-2s
Self-Employment Income	2 years tax returns + YTD Profit & Loss	IRS 1040s + P&L Statement
Bank Statements	2 months of checking/savings account statements	PDF statements from bank
Property Documents	Executed purchase contract or lease agreement	Signed Sales Contract
Asset Verification	Statements for retirement/investment accounts	401(k), IRA, Brokerage
Other	Any additional documents requested by the underwriter	LOE, Divorce Decree, etc.

THA Tip: Always provide examples and clarify what counts as 'official' documentation. Avoid screenshots unless permitted by underwriting.