

# Falcon National Bank Mortgage Lending Checklist

Purchase/Refinance | Construction | Land | HELOC | Home Equity | Mobile Home | Manufactured Home

The following checklist contains information that will be requested from you during the application process. If you are able, please submit these items with your application to expedite the process. Note: not all the items on this list will be needed, as it will depend on your situation. If you have any questions at all, please reach out to any of our Mortgage Bankers.

- ☐ Application (navigate to [www.falconnational.com/home-lending/mortgages](http://www.falconnational.com/home-lending/mortgages) and click the blue "Apply Now" button for a lender in your area, or a lender may take application over the phone)
- ☐ Proof of income (whichever applies):
  - ☐ Recent 1 month period of pay stubs
  - ☐ W2s (last 2 years)
  - ☐ Most recent 2 years of tax returns (if self-employed or earn rental income)
  - ☐ Fixed/Retirement Income:
    - ☐ Last 2 months of bank statements showing direct deposits
    - ☐ Most recent Social Security Award letter
    - ☐ 1099s for pension/annuity income
- ☐ Proof of any other current obligations or income (alimony, child support, etc.)
- ☐ Mortgage statement copies for all Real Estate that currently has a mortgage
- ☐ Homeowners Insurance policy or Agent's contact information
- ☐ A recent bank statement to show liquid assets (checking & savings)
- ☐ Purchase agreement (if applicable)

## Additional items for a Construction Loan:

- ☐ Sworn construction statement (budget for construction)
- ☐ Construction plan and specs
- ☐ Construction contract with builder (if applicable)

## Questions? Contact one of our Mortgage Bankers:



**Jeb Willis**

SVP of Mortgage Banking  
- St. Cloud Location -  
NMLS# 789498  
320.968.6195  
[jwillis@falconnational.com](mailto:jwillis@falconnational.com)



**Sara Tiaht**

Mortgage Banker  
- Foley Location -  
NMLS# 995236  
320.968.2026  
[stiaht@falconnational.com](mailto:stiaht@falconnational.com)



**Shari Rantz**

Mortgage Banker  
- Maple Grove Location -  
NMLS# 403124  
763.225.3134  
[srantz@falconnational.com](mailto:srantz@falconnational.com)



**Steve Nies**

Mortgage & Consumer Banker/VP  
- Richmond Location -  
NMLS# 697065  
320.597.2145  
[snies@falconnational.com](mailto:snies@falconnational.com)



**Michelle Page**

Mortgage Banker  
- Ham Lake & Isanti Locations -  
NMLS# 1576798  
763.235.3957  
[mpage@falconnational.com](mailto:mpage@falconnational.com)

9/29/23



866.439.4363  
[FalconNational.com](http://FalconNational.com)  
NMLS #402625

