

Rob Koellner
970-407-8288 - Office
970-407-8488 - Fax
Rob_Koellner@ExcelFG.com
Rob_Koellner@ExcelFG.com



Dar Crawford
970-407-8288 - Office
970-407-8488 - Fax
Darlene_Crawford@ExcelFG.com

Please provide the following “checked” items:

- Current Paystubs covering a full 30 day period
- 2010 W2
- 2011 W2
- Tax Returns for _____
- Social Security Awards Letter
- Pension/Retirement Awards Letter
- Current Bank Statements (Most Recent 2 months, ALL pages)
- 401 K/Retirement Statements (ALL pages)
- Copy of Driver’s License
- Copy of Social Security Card
- Credit card information for appraisal (need card #, expiration date, 3 digit code)
- Homeowner’s Insurance Agent Information
- Copy of Current Mortgage Statement
- Copy of 1st Mortgage Note
- Copy of 2nd Mortgage Note
- Other: _____
- Other: _____
- Other: _____

Provide the “checked” items along with your signed loan disclosures. You may provide these items thru email, fax, mail or drop off. Please let us know if you have any questions. We look forward to working with you!

Excel Financial Group, LLC

