

PhoneOps Funding, LLC.

If We Can't Close You, NO ONE CAN!!!

O: 321-877-4077 **F:** 253-252-8754 **W:** www.PhoneOpsFunding.com

Reverse Mortgage - Check List

Below, you'll find the items that are needed to receive a "Pre-Approval".

Put "**N/A**" for those that do not apply to you.

Received:

	2 Months of Recent Bank Statements <i>(all pages in order)</i>
	401k / IRA / Asset Statement <i>(If any)</i>
	Counseling Certificate - Signed
	Driver's license or State ID. <i>(Must be color for verification purposes)</i>
	HOA Due Statement <i>(If any)</i>
	Homeowner's Insurance Dec Page
	Homeowners Tax Certificate
	Mortgage Payoff <i>(if any)</i>
	Mortgage Statement <i>(recent statement)</i>
	Paid Invoice to pull credit <i>(invoice will be emailed to you)</i>
	Proof of Income <i>(SSI/SSA Award Letter, PayStubs, Self Employed Income Pension, Rental income, etc)</i>
	Social Security card or Medicare Card showing SS Number
	SSA 1099(s)

The logo for PhoneOps Funding, LLC features a stylized 'PO' in white and black above the company name. 'PhoneOps' is in a blue, sans-serif font, and 'Funding, LLC.' is in a black, serif font.

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To complete the mandatory counseling session with a HUD-approved Counseling Agency. You can contact a Counselor by going to:

https://entp.hud.gov/idapp/html/hecm_cnslr_look.cfm

to search for one in your area. To get a list of Counselors, do the following:

- Go to the site above
- In **Sorted By**, put in **City**
- In **State**, put your **State**
- Then click **Send**

This is the best way to get a list of Counselors as you may not get any listings if you put in your city.

NOTE: All documents must be scanned then emailed or fax if you can't upload. Screenshots or taking a picture of documents is not accepted.

Fax all documents to: 253-252-8754 or upload it at:
<http://www.PhoneOpsFunding.com/FileSubmission>