



# PhoneOps Funding, LLC.

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

**O:** 321-877-4077 **E:** [Processing@PhoneOpsFunding.com](mailto:Processing@PhoneOpsFunding.com) **W:** [www.PhoneOpsFunding.com](http://www.PhoneOpsFunding.com)

## **Reverse Mortgage - Checklist**

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
	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, with 'PhoneOps' in a teal, serif font and 'Funding, LLC.' in a black, serif font below it.

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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](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 uploaded to our site.  
Screenshots or taking a picture of documents is not accepted.

Upload all documents to:

[www.PhoneOpsFunding.com/RMFileSubmission](http://www.PhoneOpsFunding.com/RMFileSubmission)