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Apex Prime P&L Checklist

Please upload all documents through our broker portal.

**FL Business Narrative**

**Current Mortgage Statements**

* Include HOI, HOA (if applicable), and Tax info on all properties owned
* Mortgage statements on all non-subject properties

**Assets *-*** 2 months’ consecutive bank statements showing sourcing and seasoning of funds for the down payment (if purchase), closing costs and reserves (if required per program)

**Property**

* Purchase Contract (if purchase)
* Prelim within 60 days of submission
* Property Profile (if refinance)
* 1076 Condo Cert (if required)

**Income**

* 1- or 2-year Profit-and-Loss (CPA/CTEC/PTIN)
  + 1 yr P&L previous year and YTD P&L required
  + 2 yr P& past prior, prior year, and YTD P&L required
* Verification of 2 years of self-employment and percentage of ownership through CPA, Tax-Preparer, or licensing bureau