



DIRECTIONS FOR USING 401k ASSETS FOR DOWN PAYMENT OR GIFT FUNDS

Please FAX or Scan the Following Items To Us At:

(888) 742.7059

1. Contact your 401k or investment bank and request a copy of the signed "*Terms of Withdrawal*". You may have a copy of that form, but it requires your signature and authorization for the loan or withdrawal.
2. Most recent (updated) statement showing the current balance of the investment account. Proof of where the money is coming from.
3. Copy of cleared check or wire from investment bank (preferably showing cleared). If you have online banking, you can view and print the check online.
4. Updated bank statement showing deposit of funds.
5. Updated personal bank statement reflecting new balance from deposit

***** Please note that all bank statements and investment account statements must have the following information - name, date, account number.***

As always, please do not hesitate to contact us directly at (760) 635.2569

or

Charlie@CoastalLenders.com

We look forward to serving you and helping you purchase your new home!

Regards,

Charlie Rutherford