



First National Bank  
*of America*

# Non-Recourse IRA Lending Required Documentation

- ✓ Instruction form from Custodian / Administrator for purchase of real estate, if required
- ✓ Copy of picture ID (front and back)
- ✓ Most recent W-2 or 1st 2 pages of most recent tax return for IRA owner (signed)
- ✓ If property is currently leased, a copy of the lease agreement
- ✓ Current rent roll if property is a multi-family
- ✓ Rental income and expense proforma
- ✓ Insurance agent name and phone number
- ✓ Real estate agent name and phone number
- ✓ Title Company name and phone number
- ✓ Copy of previous appraisal, if available
- ✓ If an LLC will own the property, include the following data:
  - Name of LLC
  - Articles of Organization
  - Tax ID #



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### ***Return all documents to:***

**First National Bank of America**  
attn: Scott Raymond  
4660 Kalamazoo Ave SE  
Grand Rapids, MI 49508

Phone: **616-538-6017**  
Fax: **616-827-8727**  
Email: **Scott.Raymond@fnba.com**

