

Mortgage Checklist

For your convenience, we've compiled a checklist to help get your financial documents in order to prepare you for the loan application process:

All Applications:

- Employer information for the last 2 years: names, addresses, phone numbers
- Your home addresses for the last 2 years
- W-2 forms for all jobs in the last 2 years
- Most recent 30 days of pay stubs, including year-to-date earnings
- Signed personal tax returns for the last 2 years with all schedules (self-employed only)
- Most recent bank statements for all accounts - ALL PAGES
- Most recent statement for any stocks, bonds, mutual funds, IRAs, 401Ks, etc

Additional Documentation if Applicable

- Fully executed copy of sales contract with all riders and attorney information
- Gift letter, fully executed
- Divorce decree
- Renters: Last 2 years landlord(s) name(s), address(es) and phone number(s)
- For each other property owned: address, current market value, debt on property, taxes and lease/rental agreements of Schedule E form tax returns
- Bankruptcy discharge papers and any credit obtained since bankruptcy
- Corporate tax returns - Applicable for Self Employed
- Partnership returns - Applicable for Self Employed
- Year-to-date profit -and- loss statement - Applicable for Self Employed