

MORTGAGE LOAN CHECKLIST

The following documentation is required for your home loan. In order to complete the loan pre-approval, please send the information to me within the next 2 days.

Income / Employment

- Employer's names, addresses, and phone numbers for the last two years
- Paystubs to cover the last 30-day period
- W-2's and 1099s for the last two years
- Award Letters for all Social Security and Pension / Annuity income
- Tax returns for the last two years – all Schedules

Business Owner, Partnership or Corporation

- K-1s for the last two years
- Business tax returns (all Schedules), for the last two years
- Year-to-date Profit & Loss statement

Assets

- Two most recent bank statements (checking, savings, stocks, etc.), all pages
Note: Any large deposits will need to be paper-trailed
- Most recent quarterly statement for and 401K or IRA accounts, all pages
- If you are using Gift Funds for closing, there are specific documentation requirements.
Please contact me before depositing funds for any gift.

Existing Homeowners

- Most recent mortgage statement
- Homeowners insurance statement showing annual premium
- Annual property tax statement
- For rental properties, a copy of the Lease Agreement

Miscellaneous

- Drivers Licenses and Social Security cards
- Divorce Decree or Child Support Order, all pages, signed by the Judge (if applicable)
- For Veterans, a copy of your DD-214 or a Statement of Service signed by your commanding Officer
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