

MORTGAGE CHECKLIST

The following information is typically required for a mortgage loan:

Account Information

A copy of your most recent statement for checking, savings, investment and retirement accounts.

Address Information

Provide all addresses you have lived at over the past two years

Employment Records

Your most recent year-to-date pay stub(s)

Copies of your W-2s and completed Federal Income Tax Returns from the past two years

Completed Federal Income Business Tax Returns from the past two years, 1099 and K-1's (If applicable)

Other Documents

If you are applying for refinance, please provide proof of homeowner's insurance coverage amount, premium amount, and the most recent statement for the mortgage loan(s) you are refinancing.

Divorce decree (if applicable)