

Mortgage Application Checklist



Prepare these documents ahead of time to save time and set yourself up for loan pre-approval success.

Personal Info

- Driver's license (*front and back*)
- Social Security card
- Copy of green card if not a US citizen (*front and back*)
- Last 2 years' residence history

Employment & Income

- Last 30 days' payment stubs
- Last 2 years' W-2 forms and/or 1099s
- Last 2 years' state and federal tax returns (*all schedules*)

Do You Have Any of the Following?

- Copy of latest mortgage loan statement
- Loan payment information (*vehicle, boat, RV, etc.*)
- Current rental/lease agreement
- Signed copy of completed divorce decree
- Evidence of alimony or child support
- Bankruptcy and/or judgement papers
- Homeowners Insurance Agent contact information

Assets

- Last 2 months' bank statements (*Checking, Savings, Money Market, etc.*)
- Last 2 months' Investment Accounts (*401k, IRA, CD's, Stocks, Bonds*)

Please include all pages, including intentionally blank pages.

Retirees

- Pension award letter
- Retirement award letters
- Social security and/or disability income award letters

Self-Employed Borrowers

- Copy of business license
- Last 2 years' business tax returns (*all schedules*)
- Profit and loss statements
- K-1 (*Form 1065*)



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Multi-Property Owner

- Copy of current mortgage statements
- Rental agreements
- Proof of insurance and taxes

VA Loans

- Copy of DD214 (VA Loan)
- Statement of service
- Eligibility certificate

Notes

Want to save time and go green? Let's talk about e-validating your income and asset documentation to help save the environment.



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