



Mortgage Checklist

Below is a list of documents needed to process your loan. Providing all your documents promptly (within 24-48 hours) will keep your loan on track & prevent delays.

For all borrowers:

- ☐ W-2's for the last two years (all employers)
- ☐ Paycheck stubs covering the most recent 30 days period (all borrowers)
- ☐ 2 years of Federal tax returns (all pages)
- ☐ 2 months Checking & savings accounts statements (all pages)
- ☐ Quarterly or semi-annual statements for IRA's, CD's, MM funds, stocks, 401k, etc. (all pages)
- ☐ Homeowners insurance declaration page (for existing homeowners)
- ☐ Self Employed borrowers may require further information

If Applicable:

- ☐ Social Security/Retirements income award letters
- ☐ Corporate/S-Corp/Partnership returns for the past 2 years (all pages)
- ☐ Mortgage statements, hazard insurance policies, HOA info for current &/or other properties owned
- ☐ Divorce Decree (all pages)