

# MORTGAGE

## APPLICATION CHECKLIST



MORTON MORTGAGE

From pre-qualification to closing, Morton Mortgage, Inc. will help you along the road to home ownership. Beginning the mortgage application process requires every applicant to provide information and documentation that is necessary for the pre-qualification process.

We've designed this checklist so that you can easily gather the necessary items to provide to your Loan Officer. We look forward to helping you achieve the American Dream!

## now let's get started



### PAYSTUBS

Current pay stubs covering the most recent 30 days



### W2/1099

W-2 forms and/or 1099 forms for 2020 and 2021



### PERSONAL TAX RETURNS

All schedules covering the previous 2 years



### BUSINESS TAX RETURNS

All schedules covering the previous 2 years



### OTHER

- *Rental property owner: current rental agreements*
- *Retirement income recipient: pension award letter*
- *Social security income recipient: social security award letter*
- *Child support/alimony recipient: copy of divorce decree and/or child support order*



### BANK STATEMENTS

All pages from the past 2 months for all asset accounts



### PROPERTY INFORMATION

Copy of mortgage statement, property tax bill and homeowners' insurance declaration page for each property owned



### PERSONAL DOCUMENTATION

Photo ID and Social Security Card (*Passport or Military ID will be sufficient in place of SS Card*)



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