

Mortgage Document Checklist



All Borrowers

- W2's for most recent 2 years
- Paystubs for the most recent 30 Days
- Checking and Savings Statements for 2 months (all pages)
- Most recent 2 months statements for 401K, stocks and other investments
- Photo Id (Drivers License or Passport)

If you Own Other Real Estate (or for a Refinance)

- Mortgage Statement each property
- Declaratations page of Hazard Insurance to show annual premium
- Document HOA payment if applicable

Self-Employed Borrowers

(If over 25% ownership)

- Most recent 2 years Personal Federal Returns
- Most recent 2 years Business Returns including all schedules
- K-1 Forms

Documents that may be Required

- Retirement Income - 1099R/Benefit Letters/ Paystubs
- Divorce Decree
- Permanent Resident Card