



MORTGAGE LOAN CHECKLIST

We will be requesting the following information for the processing of your mortgage loan application once we receive the signed Loan Estimate that will be mailed to you. Preparation of these documents in advance will expedite your loan transaction.

INCOME

Salaried Borrower(s)

- W-2 forms for previous two (2) years
- Two (2) most recent paycheck stub(s)

Commissioned/Bonus Borrower(s)

- Complete copies of previous two (2) years personal Federal tax returns (signed & dated)
- Two (2) most recent paycheck stub(s)

Self-employed Borrower(s)

- Sole Proprietor, Partnership, S-Corp and/or Corporate tax returns including all schedules for the previous two (2) years (signed & dated)
- Current, signed and dated, year-to-date interim financial statements, including balance sheet and profit and loss statement

ASSETS / LIABILITIES

Copy of past two (2) statements, either monthly or quarterly, on the following accounts:

- Checking
- Savings
- Money market
- Retirement Accounts
- Investment Accounts

MORTGAGE REFINANCE

- Most recent statement of mortgage being refinanced
- Most current statement of homeowner's policy showing the premium, coverage, and renewal date
- Most recent statements for other debts being satisfied
- Abstract of title
- Survey Map

PURCHASE

- Copy of purchase contract on subject property and listing agreement or contract on existing home being sold
- Copy of your cancelled earnest money checks