



MORTGAGE CHECKLIST

- Legible copy of your current state issued Driver's License, Identification Card or Passport.
- Legible copies of one (1) month of paycheck stubs for ALL qualifying borrowers.
- Legible and complete copies of the most current 2 years W2's for ALL qualifying borrowers.
- Please provide legible and complete copies (all pages and schedules) of your most recent two (2) years personal tax returns (1040s). If you filed an extension for the most current year due as of April 15th, please provide a copy of the filed extension. If you file corporate/business tax returns, please provide a complete copy of business returns as well, including K1's if applicable.
- Legible and complete copies (all pages) of your most current two (2) months bank statements for all Checking, Savings, Investment and Retirement (401(k)) accounts.
- Homeowner's Insurance Agent's phone number.
- (FOR REFINANCES) Provide your most current survey on your property.
- (FOR REFINANCES) Provide your most current Mortgage Statement.

IF APPLICABLE

- Copy of divorce decree (ALL Pages).
- Copy of Order for Child Support (ALL Pages).
- Copy of Bankruptcy Discharge papers.