



## Mortgage Loan Documentation Checklist

Providing the following information will enable us to expedite your mortgage loan request. This may be more than enough information but is requested in order to minimize follow up. If you have any questions regarding the information requested, please ask. THANK YOU

- Pay stubs from most recent **30 days** (most recent LES if military)
- All W2s and/or 1099s from most recent **2 years**
- Signed copies of complete, **Federal** tax returns with **all** schedules from most recent **2 years**
- Signed Year-To-Date Profit & Loss Statement, through at least most recent Quarter if self-employed
- Award letter if receiving Social Security, Retirement or Disability income
- Bank statements from most recent **2 months** (all pages)
- Investment and/or Retirement statements from most recent Quarter, if applicable (all pages)
- Address, estimated value and property tax information on all real estate owned
- Most recent mortgage statement and insurance declarations page on all real estate owned
- All current leases for all rental property owned
- Insurance agent's name and phone number (and copy of Declaration Page if refinancing)
- Copy of **complete** Bankruptcy and Discharge papers, if applicable
- Copy of divorce decree and/or court order for child support received, if applicable (if including)
- Copy of **complete** Purchase Agreement, all addendums and Property Disclosure, if a purchase
- Copy of canceled earnest money check, front and back, if applicable
- Name and phone number and/or e-mail of your real estate agent, if applicable
- **If refinancing**, copy of Closing Statement from closing on current loan
- **If VA**, Copy of DD214 or orders
- Copy of Driver's License or State or Military ID