



MORTGAGE DOCUMENT CHECKLIST

First Mortgage • Mini Mortgage • Home Equity Line-of-Credit

To expedite your Mortgage Loan Application quickly and efficiently, it is highly recommended that you bring the following documentation at the time of application.

Please make sure that the paperwork is complete:

- Verification of Income**
 - Last 2 years of Federal Tax return with W-2s or 1099s (include all schedules)
 - 1 month of current paystubs with employer's name and YTD income
 - Social Security or Disability current year Award Letter
 - If self-employed, include personal and business tax returns including K-1

- Copy of last 2 months Bank Statements**, please include all page numbers
 - Checking and Savings
 - Mutual funds
 - IRA or 401K

- Miscellaneous** (if applicable)
 - Copy of divorce decree
 - Court order for child support payments
 - Copy of bankruptcy discharge
 - Copy of foreclosure documents

- Real Estate Contract** signed by all parties – include contact information

- Copy of Condo Association By-Laws** - include contact information & Phone #

- Refinances** – include the following
 - Mortgage Statements
 - Homeowner's Insurance

