



Mortgage Checklist

Have Everything You Need?

Preparing your documents ahead of time can streamline the application process. Below are some items that you should have ready at-hand.

Purchasing?

- Copy of your current driver license
- Social security card
- W-2s from the last 2 years
- Income document for past 2 months (paystubs, leave and earning statements, etc)
- Completed tax returns from the last 2 years for personal and business if applicable (signed)
- Bank statements from the previous 2 months (all pages)
- 401(k), profit-sharing statements or other income documentation
- Quarterly and semi-annual statements for IRAs, CDs, money market funds, and dividends
- If non-resident, copy of Certificate of Resident Alien Status (Green Card)
- If applicable: divorce decree/separation agreement, child support documentation, bankruptcy documentation, etc

Under Contract?

- The purchase contract
- Copy of canceled earnest money deposit check

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