



Mortgage Application Checklist

You will need to provide some information to start the mortgage application process. Here is a list of items to help you streamline the home buying process.

General Information:

- ☐ Copy of Photo ID (Government Issued)
- ☐ Residence and Employment history for the preceding two years
- ☐ Income information for all borrowers
- ☐ Social Security Numbers and dates of birth for all borrowers
- ☐ Purchase contract and earnest money information

Required Income Information:

- ☐ Current Paystubs (30 Days, most recent)
- ☐ W-2 Forms (most recent 2 years)
- ☐ If self-employed, tax returns, both personal and business (2 years)
- ☐ Documentation for any other income sources

Required Asset Information:

- ☐ Bank Statements for all accounts (All pages of 2 months most recent)
- ☐ Asset Statements for Retirement and Investment Accounts (all pages of most recent)

Additional Information (If Applicable):

- ☐ Documentation of Credit Disputes
- ☐ Divorce Decree
- ☐ Bankruptcy Documents

Important Note:

It is important to share all pertinent financial information with your loan officer. Failure to disclose anything that may affect the underwriting process may result in adverse results. Any change in financial or employment after application should be reported to your Loan Officer.

Subject to credit approval.

