



MORTGAGE CHECKLIST

INCOME:

- Federal Tax Returns** : Last 2 years - complete with **ALL** pages and schedules (state returns are not needed).
- W-2's** : Last 2 years (1099's and/or K1's, if applicable).
- Paystubs** : Most recent consecutive pay stubs (must cover minimum 30-day period).

ASSETS:

- Bank Statements** : 2 months of most recent bank statements with **ALL** pages.
- Investment/Retirement Statements** : Most recent 401K and/or IRA statements (if applicable).

OTHER DOCUMENTS:

- Copy of Driver's License** for identity verification (Permanent Resident Card or Visa, if applicable).
- Copy of gift checks and deposit slips.**
- Copy of listing and binder/contract** (we can get this form for you).
- Mortgage statement** showing taxes and insurance for all properties owned (if applicable).