

The Mortgage Checklist



Information may be required to be provided by you (and any co-borrower) during the loan process. In order to expedite the processing of your loan we recommend you have this information and/or copies available at the time of application. Additional items may be requested depending on certain underwriting criteria :

- Your Social Security number
- Last 30 days of Current pay stubs
- The last two years of your W2s
- If self- employed, a copy of your signed Federal tax returns for the past two years
- Bank statements for the past two months
- Investment account statements for the past two months
- Retirement account statements for the past two months
- Credit card account information
- Auto loan account information
- Personal loan account information
- Any additional loan information

If you currently own Real Estate:

- Mortgage holder account, payment and balance information
- Hazard insurance policy information
- Home equity account, payment and balance information (if applicable)
- Two years of personal tax returns

