

Mortgage Loan Checklist

Identification

- Driver's license
- Social Security card
- Resident Alien card (front and back)

Current Bank Statements

- Checking / Savings / CD
- Stocks / Bonds / Money Market
- IRA / 401k

Property

- Homeowners insurance contact information
- Mortgage statements for current properties
- Landlord contact information

Income & Employment

- Two full years of employment history
- W2s or 1099s from the past two years
- Pay stubs from most recent 30 days
- Retirement / SS award letters
- Federal tax returns (with two years of all schedules)

If Applicable

- Business tax returns (two years)
- YTD profit and loss statement
- HOA dues statement
- Bankruptcy paperwork
- Divorce or child support documentation
- DD214 VA Form