



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