

Document Checklist

The following information is typically required for the mortgage loan process:

- Driver's License
- Current pay stubs covering the past 30 days
- W2's for the past 2 years
- If self employed, your personal and business tax returns for the past two years
- Most recent two months bank statements: Checking, Savings, Money Market
- Investment account statements for the past two months
- Retirement account statements for the past two months
- Signed Agreement of Sale if purchasing a home
- Deed to your home, if refinancing
- For all properties currently owned:
 - Most recent mortgage statements
 - Current real estate tax bills
 - Home Owner's Insurance Policy/Declarations Pages