



MORTGAGE APPLICATION DOCUMENT CHECKLIST

PERSONAL INFORMATION

- ☐ Copy of Drivers License or Passport or Resident Alien Card
- ☐ VA Applicant: Copy of DD-214 or LES, Certificate of Eligibility

HOUSING INFORMATION FOR ALL PROPERTIES OWNED

- ☐ Copy of current Mortgage statement(s)
- ☐ Copy of current Homeowners and Flood Insurance policies (declaration pages)
- ☐ Copy of current property tax bill(s)
- ☐ Copy of current HOA statement(s) if applicable.

FINANCIAL, EMPLOYMENT AND INCOME

- ☐ Last 2 years of personal tax returns, including W2's and /or 1099's
- ☐ Last 2 months of bank statements for checking, savings, and money market accounts (all pages even if they are blank)
- ☐ Most recent 30 days' pay stubs with YTD earnings
- ☐ If Retired: Award letters from Social Security, pension plans, or VA Disability with the last 2 years of 1099's
- ☐ If Self Employed: Last 2 years of personal and business tax returns, YTD profit & loss (signed & dated) and most recent 3 months business bank statements.
- ☐ Assets: Retirement account statements, investment account statements, provide supporting documents for other payments made to you (rents, alimony, child support, divorce decree, etc.)
- ☐ Liabilities: Student loan statement from loan servicer showing the total balance, child support, alimony, divorce decree (payment amounts, balances, and remaining terms)
- ☐ Gift Funds: Gift Letter/ documentation (sending and receiving bank account statements showing gift funds out of one account and into the other)

REFINANCES

- ☐ Copy of Owners Title Policy
- ☐ Copy of Survey
- ☐ Copy of current Mortgage statement