



PLEASE DO NOT STAPLE  
DOCUMENTS.

ADDITIONAL INFORMATION  
MAY BE REQUIRED TO  
MEET UNDERWRITING  
GUIDELINES

## Mortgage Loan Application Checklist

Copy of purchase contract, signed by all parties if this is a purchase transaction.

Copies of your past two years W2 and/or 1099 forms.

Copies of your most recent pay stubs covering 1 full month of pay.

Copies of your two (2) most recent statements or quarterly statements of all bank accounts, investment accounts and retirement accounts, listing all assets for loan approval. Account owner's name, bank name, account number and all pages must be included.

Copies of your past two (2) years Personal Federal Tax Returns with all schedules.

Copy of Driver's License (or valid ID).

Name, address and phone number of current landlord.

If you are self-employed or own 25% or more of any company, copies of tax returns, S Corporation returns and/or Form 1065 (K-1) for partnerships, as well as your personal returns for the past two years. A year-to-date profit and loss and balance sheet signed by you or your accountant may also be required.

If you receive income from rental properties, copies of your past two years Federal tax returns are required. All schedules must be included.

If you are retired and receive income from Social Security and/or pensions, please forward a copy of your most recent Social Security Award Letter and a copy of your retirement awards letter or some other documentation to include name and address of provider.

Signed Credit Authorization

### Information Needed on all Properties Owned

Copy of most recent mortgage statement.

Copy of most recent homeowner's insurance declaration page.

Copy of Real Estate Tax Paid Receipt.