

Document Checklist

Your business is important to us and we are committed to ensuring that you and your loan receive the highest level of care and attention throughout the entire mortgage process. Please use this checklist to prepare all the necessary documents you and your co-borrowers will need to complete your mortgage application. Additional documents may also be needed later in the process.

IF APPLICABLE

- Copy of your signed closing disclosure from when you purchased the property
- Most recent mortgage statement (for refinances or other property owned)
- Copy of current mortgage notes
- Full divorce decree/ child support order
- Business tax returns including all schedules, for the past two years
- Most recent social security/pension income awards letter
- First-time homebuyer class confirmation
- College transcripts
- Bankruptcy papers (all pages)
- Landlord name and telephone number

ALL FILES

- Copy of driver's license or government-issued photo ID (front and back)
- Most recent 30 days of paycheck stubs
- W-2's (and/or 1099's) for the past two years
- Federal tax returns, including all schedules, for the past two years
- Most recent two months' checking and savings account statements (all pages)
- Two most recent retirement statements or quarterly statements (if you will be using for down payment)

