Mortgage

Quick Tips

Document Checklist

ALL BORROWERS

- [ ] Valid photo ID for each borrower
  (e.g., driver's license or state-issued ID, passport, or military ID)
- [ ] Copy of Social Security Card
- [ ] Last 2 months of each of the following:
  Bank statements, brokerage statements, and retirement statements.
  (Please include all numbered pages)
- [ ] Terms of withdrawal for retirement accounts
- [ ] Documentation of recent deposits
  (not including automated payroll)
- [ ] Executed purchase contract + addendum
- [ ] Copy of earnest money check
- [ ] Homeowners insurance policy + agent, company name, and phone number

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SALARIED BORROWERS

- [ ] Last 30 days of paystubs for each income source for each borrower
- [ ] Last 2 years of tax returns for each applicant

SELF EMPLOYED BORROWERS

- [ ] Last 2 years of business tax returns
- [ ] Year-to-date profit/loss statement + balance sheet for each business with 25% or more ownership by a borrower
- [ ] W-2, K-1, and/or 1099 forms for the previous 2

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