

# 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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