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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alta HOME LENDING

2026 FIVE STAR MORTGAGE PROFESSIONAL Mary Steinmeyer

EQUAL HOUSING LENDER

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