



Mortgage Document Checklist

To help make the mortgage process run as efficiently as possible, please have the following documents available:

Current paystub within 30 days

Most recent two years W2s

Most recent two years complete tax returns (business & personal) if you are self-employed

Most recent 2 months bank statements for all accounts

Most recent retirement/401k/investment statements

Recent mortgage statement (including any additional mortgages on primary residence, rental properties or 2nd homes)

Copy of homeowner's insurance declaration page or agent name and phone number for all real estate properties owned

Please be aware that it is very important we receive all necessary documents in order to ensure that we can process your loan application as smoothly and quickly as possible and avoid any unnecessary delays. Feel free to contact us with any questions you may have.

Thank you!