

# Sample Mortgage Application Checklist



## INCOME

- Paycheck stubs for the most recent 30-day period
- W2 forms from the last two years
- Page 1 of your most recent Federal Tax Return (1040)
- If self-employed:
  - Federal tax returns for the last two years, signed and dated with all schedules attached
  - Corporate returns for the last two years (if applicable)

## ASSETS (ALL PAGES AND COMPLETE STATEMENT)

- Copies of the last two months' bank statements, including
  - Savings
  - Checking
  - Stocks
  - Bonds
  - Money Market
  - Mutual Funds
  - IRAs
  - 401(k)

## REAL ESTATE OWNED (IN CASE YOU OWN A PROPERTY)

- Copy of your statement or coupon from any lien holder
- Copy of your most recent property tax bill
- Copy of the front page of Homeowners Insurance Policy
- Copy of Leases or Federal Tax returns including schedule E showing rental income, if applicable

## DEBT

- If required to pay alimony or child support, a copy of Divorce Decree or Separation Agreement

## MISCELLANEOUS

- Photo ID and proof of Social Security Number
- If not a US citizen, copy of front and back of your green card or a valid visa
- Payment (in the form of a check or authorization to charge to credit card) for credit report