

**MORTGAGE LOAN CHECKLIST**

The following documentation is required for your home loan. In order to complete the loan pre-approval, please send the information to me within the next 2 days.

**Income / Employment**

󠅁 Employer’s names, addresses, and phone numbers for the last two years

󠅁 Paystubs to cover the last 30-day period

󠅁 W-2’s and 1099s for the last two years

󠅁 Award Letters for all Social Security and Pension / Annuity income

󠅁 Tax returns for the last two years – all Schedules

**Business Owner, Partnership or Corporation**

󠅁 K-1s for the last two years

󠅁 Business tax returns (all Schedules), for the last two years

󠅁 Year-to-date Profit & Loss statement

**Assets**

󠅁 Two most recent bank statements (checking, savings, stocks, etc.), all pages

Note: Any large deposits will need to be paper-trailed

󠅁 Most recent quarterly statement for and 401K or IRA accounts, all pages

󠅁 If you are using Gift Funds for closing, there are specific documentation requirements.

Please contact me before depositing funds for any gift.

**Existing Homeowners**

󠅁 Most recent mortgage statement

󠅁 Homeowners insurance statement showing annual premium

󠅁 Annual property tax statement

󠅁 For rental properties, a copy of the Lease Agreement

**Miscellaneous**

󠅁 Drivers Licenses and Social Security cards

󠅁 Divorce Decree or Child Support Order, all pages, signed by the Judge (if applicable)

󠅁 For Veterans, a copy of your DD-214 or a Statement of Service signed by your commanding

Officer

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**MORTGAGE GROUP, LLC**

AmeriDream