

Pre-Approval Checklist

Initial documents and items needed to begin the mortgage approval process

The below items are needed for a quick and smooth start of the pre-approval process. Check-off the boxes on this form for items you collect to stay organized. Additional documents may be needed later in the process.

Document	Why is it needed?
1 form of Government Issued ID	Federal regulations (Patriot Act)
W2's and/or 1099's for the last 2 years	Analysis of your income history
Paystubs for the last 30 days	Qualification process
Tax Returns (1040/1120*/1065) for the last 2 years ALL pages of tax returns - including blank pages	Qualification process
Self Employed / Business Interest 1120 &/or K1's for the last 2 years	Qualification process
Bank/Asset Statements for the last 2 months ALL pages of statements - including blank pages	Verify reserves and ability to pay down payment
Retirement Savings	If providing retirement statements, include the terms of withdrawal
Homeowners Insurance (contact information & quote)	Qualification process
Rental Properties (required for all rentals: mortgage statements, homeowners insurance, HOA statements, lease agreements)	Qualification process
Bankruptcy Papers If applicable, copies of all schedules and discharge papers are required	Credit Analysis
Divorce Decree If applicable, a certified copy or signed copy by the Court of your Divorce Decree is required	Qualification process
Child Support Order (three months evidence of receipts required)	Qualification process

**For any questions about these documents or the mortgage process ahead,
please do not hesitate to contact me or my team.**



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Scan to apply
for financing



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