

Mortgage Item Checklist

W2 employee with no ownership

- 1 month of Pay Statements
- Last 2 years of W2's (employer generated)

Retirement

- Most recent awards letter for Pension and SSI
- Last 2 years 1099-R or SSA-1099
- 2 months Bank Statements reflecting the deposits

Child Support or Alimony

- Child support: signed court order / decree
- Alimony: copy of Divorce Decree, all pages
- 3 months of bank statements reflecting deposits for child support or alimony

Self Employed

- Last 2 years of Federal Tax Returns (signed and dated)
include all schedules

- Copy of business license
- Last 2 years of K1's, and/or 1099's

Business Ownership greater than 20%

- Last 2 years of Federal Tax Returns (signed and dated)

Assets:

- 2 months of Bank Statements (all pages even if blank)

Miscellaneous

- Insurance quote for purchases
- Insurance declaration page for all properties owned
- Most recent mortgage statements for all properties owned
- Property tax bill on all properties owned
- Lease agreements on all properties owned
- Copy of your Driver's License

Any Questions, Please feel free to Contact me