

## Required Mortgage Loan Documents Checklist

### Financials

- ☐ Last 2 Years PERSONAL Tax Returns - ALL PAGES
- ☐ Last 2 Years W2's (if applicable)
- ☐ Last 2 Years BUSINESS Tax Returns – ALL PAGES and Schedules (if applicable)

### Income

- ☐ Last 30 Days of Pay Stubs
- ☐ Child Support or Alimony - Court Ordered (if applicable)
- ☐ Social Security Award Letter (if applicable)
- ☐ Proof of Retirement (if applicable)
- ☐ Rental Income – Copy of leases – Should show on Schedule E of Tax Return

### Assets

- ☐ Last 2 Months Bank Statements - ALL PAGES
  - Checking, Savings, 401k, IRA, Stocks, Ect.

### Other Docs

- ☐ Copy of Driver's License (Clear Copy)
- ☐ Copy of Social Security Card / Resident Alien
- ☐ Divorce Decree (if applicable)

### Additional Docs Required "IF" REFINANCE

- ☐ Copy Homeowners Insurance
- ☐ Copy of ALL Mortgage Statements
- ☐ Copy of Owner's Title Policy and Survey

**questions? call Me. (561) 719-7474 direct**  
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