



## MORTGAGE APPLICATION CHECKLIST

We request the following documents to process your loan application:

### A. APPLICATION:

**1) Identification: Personal identification containing a photo is required from the following list:**

- \_\_\_\_\_ a. State issued drivers license
- \_\_\_\_\_ b. State issued I.D. card
- \_\_\_\_\_ c. Employer issued I.D. card
- \_\_\_\_\_ d. Alien I.D. card

**2) Income/employment**

- \_\_\_\_\_ a. Two current pay stubs
- \_\_\_\_\_ b. Two years income tax returns, (including all schedules) signed by applicants.
- \_\_\_\_\_ c. Two years W-2's
- \_\_\_\_\_ d. Social Security award letter, disability/pension income
- \_\_\_\_\_ e. Year to date profit & loss statement (for self-employed Borrowers)

**3) Assets**

- \_\_\_\_\_ a. Three consecutive bank statements, copy of savings passbook, certificate of deposit
- \_\_\_\_\_ b. Gift letter

**4) Liabilities**

- \_\_\_\_\_ a. Copy of credit card statements
- \_\_\_\_\_ b. Copy of installment loan, student loan and/or auto loan Coupon

**5) Miscellaneous**

- \_\_\_\_\_ a. Copy of sales contract or lease agreement on present home
- \_\_\_\_\_ b. Copy of divorce settlement or decree
- \_\_\_\_\_ c. Copy of lease(s) on **all** rental property

**6) Property:**

- \_\_\_\_\_ 1. Signed purchase agreement including amendments & inspection reports
- \_\_\_\_\_ 2. Copy of both sides of canceled deposit check(s)
- \_\_\_\_\_ 3. If refinance, copy of recorded mortgage deed or warranty deed
- \_\_\_\_\_ 4. Condominium documents and by-laws