



MORTGAGE APPLICATION CHECKLIST

- Copy of ***Driver's License***
- Current ***Income Statement/Documentation*** Totaling One Month (may consist of)
 - Paystubs
 - Pension Statement/ Awards Letter
 - Social security awards letter
 - Retirement Distributions
- ***W-2s*** and/or ***1099s for the last 2 years***
 - 2021 & 2022 (if not available, please include 2020)
- ***Federal Income Tax Returns (1040s) and all schedules for the last 2 years***
 - 2021 & 2022 (if not available, please include 2020)
 - Include business tax returns for years above as well as K1(s), if applicable
- ***Bank/Asset Statements***
 - Most recent 2 months on ALL ACCOUNTS including bank accounts, 401K's, IRA's, stocks, etc.
 - All pages, even if BLANK (front & back)
- ***Property Profile*** (please provide for each property you currently own)
 - Hazard insurance declaration page
 - Property tax bill
 - Monthly mortgage statement/coupon
 - Copy of HOA bill, if applicable
- ***Divorce Decree*** (if applicable)
 - Include all pages and settlement statements.
- If you are interested in obtaining a VA Home Loan
 - DD214

