










MORTGAGE CHECKLIST

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-  **Copy of most recent YTD pay stub(s) to reflect the most recent 30 days of income**
 -  **W-2 statements from past two years**
 -  **Signed personal and business tax returns from the past two years (all pages and relevant schedules required)**
 -  **If self-employed, a copy of most recent quarterly or year-to-date profit/loss statement**
 -  **Two most recent bank statements (all pages) for all financial accounts including: checking, savings, IRA, 401(k), and brokerage accounts**
 -  **A copy of the signed Purchase and Sale Agreement (for purchase transactions only)**
 -  **Most recent monthly statements for any mortgages, including your most recent tax bill and insurance statements**
 -  **Driver's license and Social Security card**