



# MORTGAGE CHECKLIST

---

## POTENTIAL LIST OF ITEMS YOUR LENDER MAY NEED OR REQUIRE TO PROCESS YOUR LOAN:

- **W-2 TAX FORMS** or business tax returns if you're self-employed - for the last two or three years for every person signing the loan.
- **AT LEAST ONE PAY STUB** for each person signing the loan.
- **ACCOUNT NUMBERS** of all your credit cards and the amounts for any outstanding balances.
- **TWO TO FOUR MONTHS OF BANK OR CREDIT UNION STATEMENTS** for both checking and savings accounts.
- **LENDER, LOAN NUMBER, AND AMOUNT OWED** on installment loans, such as student loans and car loans.
- **ADDRESSES** where you've lived for the last five to seven years, with names of landlords if applicable.
- **BROKERAGE ACCOUNT STATEMENTS** for two to four months, as well as a list of any other major assets of value, such as a boat, RV, or stocks or bonds not held in a brokerage account.
- **YOUR MOST RECENT 401(k)** or other retirement account statements.
- **DOCUMENTATION TO VERIFY ADDITIONAL INCOME** such as child support or a pension.

