

MORTGAGE DOCUMENT CHECKLIST

Dear Mr(s). _____

The following items will be needed when you submit the application:

For Salary Borrowers

- ___ Last 2 months bank statements (All Pages)
- ___ 2 most recently pay stubs (cover 1 full month)
- ___ Last 2 years (2011 & 2012) W-2
- ___ Last 2 years' income tax return (1040) with all schedules (signed) (Note: C1, rental property and and so on)
- ___ A copy of driver license to verify DOB
- ___ All rental agreements if you own rental properties
- ___ Copy of green card (Front/Back) if you are permanent resident or H1 Visa
- ___ Home Owner Association's name, address & phone number
- ___ Hazard insurance company, agent's name & phone number

For Self-Employed Borrowers

- ___ Last 2 months bank statements (All Pages)
- ___ Last 2 years' income tax return (1040) with all schedules (signed)
- ___ Copy of business license
- ___ YTD profit & loss statement (signed)
- ___ Copies of all K-1s if you are partnership
- ___ Copies of 1 year corporate returns if applied (signed)
- ___ A copy of driver license to verify DOB
- ___ All rental agreements if you own rental properties
- ___ Copy of green card (Front/Back) if you are permanent resident or H1 Visa
- ___ Home Owner Association's name, address & phone number
- ___ Hazard insurance company, agent's name & phone number

Purchase Loan

- ___ Purchase contract, Selling/Listing agents' name & phone number
- ___ Title company, escrow officer's name & phone number, escrow number