

# Mortgage Application Documents Checklist



## Most Loans

- Last two years W-2 forms
- Last two years tax returns
- Most recent pay-stubs from the past 30 days
- Two months of most recent bank statements
- Investment accounts/401k and retirement statements
- Homeowners insurance agent name and number
- Copy of drivers license
- Purchase and Sale agreement
- Loan application
- IRS Form 4506 (provided by lender)

## If Applicable:

- Copy of mortgage statements for all properties
- Rental agreements for all properties owned
- Proof of taxes and insurance on all properties
- Social Security benefit letter
- Pension benefit letter
- Divorce papers
- Child support order
- Bankruptcy papers and Discharge Notice