

Mortgage Checklist

When you're ready for a mortgage here are a few things you should gather ahead of time to bring with you when you meet with your Mortgage Specialist.

For a residential mortgage, you'll need your:

- Most recent paystubs for the past 30 days
- W2's for the last 2 years
- Most recent year tax return
- Official bank statements for the last 2 months (all pages)

If you're Self-employed/Corp/LLC, you'll need:

- Personal tax returns for the last 2 years
- Business tax returns for the most recent last two years

If under a purchase contract, you'll need:

- The signed purchase contract, signed by all parties
- Home disclosure statement
- Listing sheet
- Copy of your Earnest money Deposit check (EMD)

If refinancing, you'll need:

- Copy of recent mortgage statement, itemizing your monthly payment
- Paid property tax receipts
- Current declaration page of homeowners insurance



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