

APPLICATION CHECKLIST

Prepare for Your Mortgage

Below is a list of items you will need in order for me to complete your loan transaction in a timely manner.



- PAYSTUBS: copy of most recent 30-day period
- W-2s: copy of last two years' forms
- TAX RETURNS: previous two years' federal tax returns and all schedules, including K-1s, if:
 - you are self-employed: need your current, year-to-date profit and loss, as well as your balance sheet
 - you are an owner of a corporation or partnership (K-1)
 - all or part of your income is derived from bonus commission, partnership, trust or rental income
- BANK STATEMENTS: copy of most recent two months' statements for all checking, savings, CDs, investment accounts and retirement accounts
- COPY OF SALES CONTRACT (if applicable)
- IF RENTING: landlords' names and phone numbers for the last two years

Name: _____ Phone: _____

Name: _____ Phone: _____

IF REFINANCING:

- Copy of warranty deed
- Copy of title insurance policy
- Copy of homeowner's insurance policy
- Copy of flood insurance policy (if applicable)
- Copy of property survey
- Copy of current mortgage statement
- Copy of closing settlement statement (if there was a first and second lien)

Insurance agents information:

Name: _____ Company: _____

Phone: _____ Email: _____

As soon as we receive the above items, we will process your application and show you why we're the best in the business. Please don't hesitate to contact me should you have any questions.

Loan
Officer
Photo

Loan Officer

Loan Officer Title | NMLS 12345
Direct: 123.456.7890
Cell: 123.456.7890
www.LoanOfficer.com

Bank Logo

123 Street Address, Suite 123
City, State 12345
Branch NMLS 123456

