



# Mortgage Loan *checklist*

YEAR

DOCUMENT	✓	LOCATION	DIGITIZED
Pay stubs (within 30 days)			
W-2 forms (last 2 years)			
Award letters (social security, disability, etc)			
Decree/Settlement Agreement			
Previous Rent/Mortgage records (within 1 year)			
Credit counseling or bankruptcy discharge paperwork (if necessary)			
Bank Statements (2 months: Savings, Checking, Investments)			
Stocks/Securities Statements (2 months)			
Sale of Assets (proof of ownership, sale, & transaction)			
Settlement Statement/Closing Disclosure			
Self-Employment/Rental Property Tax Returns (2 years)			
Year-to-date business Profit and Loss statements (preferably completed by a CPA)			
Purchase agreement (legal property description & addendums)			
Home Inspection Report			
Discrepancies on credit with explanation			
Social Security Card, Photo IDs			