



MORTGAGE APPOINTMENT CHECKLIST

Income Documents:

- The two most recent pay stubs (covering the most recent 30 days)
- W-2 Forms from previous two tax years

Self-Employed People:

- Last two years of tax returns, including all pages and schedules

Retired Persons/Social Security Recipients:

- Award letters
- 1099s from previous two years

Child Support Recipients:

- Divorce decree or court order, including all signed pages - showing anticipated monthly support

Assets Documents

- Two most recent financial statements for all your asset accounts, such as checking, savings, or retirement accounts

Miscellaneous Documents:

- Copy of driver's license or other valid photo identification

