

CHECKLIST

Your Mortgage Application

- W-2 Tax forms** – or business tax returns if you're self-employed – for the last two or three years for every person signing the loan.
- At least one pay stub** for each person signing the loan.
- Account numbers** of all your credit cards and the amounts for any outstanding balances.
- Two to four months of bank or credit union statements** for both checking and savings accounts.
- Lender, loan number, and amount owed** on installment loans, such as student loans and car loans.
- Addresses** where you've lived for the last five to seven years, with names of landlords if appropriate.
- Brokerage account statements** for two to four months, as well as a list of any other major assets of value, such as a boat, RV, or stocks or bonds not held in a brokerage account.
- Your most recent 401(k)** or other retirement account statement.
- Documentation to verify additional income**, such as child support or a pension.

