

**TAKE YOUR FINANCIAL CONFIDENCE TO THE  
NEXT LEVEL!**

# **MORTGAGE CHECKLIST**

- **EMPLOYMENT HISTORY (LAST 3 YEARS)**
- **ADDRESSES OF RESIDENCE (LAST 3 YEARS)**
- **4 RECENT CONSECUTIVE PAYSTUBS**
- **W2 FORMS (LAST TWO YEARS)**
- **ALL PAGES ON LAST 3 MONTHS BANK STATEMENTS**
- **EXPLANATION OF SIGNIFICANT LARGE DEPOSITS OR WITHDRAWALS THAT OCCURRED IN LAST 3 MONTHS**
- **2 RECENT CONSECUTIVE ASSET STATEMENTS (401(K)S, IRA, ROTH, NON-RETIREMENT ACCOUNTS, ETC.)**
- **2 YEAR COMPLETE RECENT TAX RETURNS**
- **NAME & PHONE NUMBER OF INSURANCE AGENT WHO WILL BE INSURING YOUR PROPERTY**
- **COPY OF PHOTO ID AND SOCIAL SECURITY CARDS**