



Mortgage Application Checklist

These are just some of the document will be asked to supply when applying for a new mortgage

- Your address for the last two years
- The name and address of your employer for the past two years
- Social Security number
- W2 forms for the past two years
- Copies of pay stubs for the most recent 30-day period
- Copies of statements for the most recent two months for bank accounts, mutual funds, brokerage accounts, retirement, etc. to identify the source of your down payment and asset reserves.
- Two most recent years of federal tax returns, including all schedules. This may include two years of corporate or partnership federal tax returns, including K1s for all companies which you have ownership of
- Name, address and phone number of current landlord, if applicable
- Estimate of value of any real estate ownership
- Name and number of insurance agent you will be using for your homeowners insurance