



**HOME LOAN
CHECKLIST**

Help us process your mortgage loan quickly and efficiently by having these items available:

- Copy of pay stubs to cover the most recent 30 days for both full-time and part-time employment
- Copy of most recent two years' W-2 forms*
- Copy of most recent two months' bank statements for each account listed on the application*
- Copy of most recent two years' tax returns*
- Copy of Driver's License or Picture I.D.
- Copy of homeowners insurance policy (refinances only)
Agent's Name: _____
Agent's Phone Number: _____
Premium Amount: _____
Next Due Date: _____
- Annual Property Tax Amount (refinances only) \$ _____
- Signed copy of the purchase agreement with listing sheet, if applicable

**Please provide all pages of tax forms/returns and bank statements. We will contact you if we need more information.*