When applying for a mortgage, you will be required to provide copies of financial documents. Below is a list of some of the information you will likely be asked to provide. In addition to these documents, and depending on your circumstances and the type of mortgage you select, your loan officer will let you know the specific documentation needed for your situation.

Income:

- [ ] Most recent 30-days of paycheck stubs
- [ ] Most recent 2-Years Form W2
- [ ] Most recent 2-years personal Federal Tax Returns (all schedules all pages)
- [ ] Most recent Award Letter or Form 1099 for Social Security and or Pension Income (if applicable)

For any income sources derived from a 25% or greater ownership in a business:

- [ ] Most recent 2-Years of Form 1065 Partnership Returns with all schedules, k-1's
- [ ] Most recent 2-Years of Form 1120 Federal Corporate Tax Returns with all schedules
- [ ] Most recent 2-Years of Form 1120S Federal Corporate Tax Returns with all schedules, k-1's

Assets:

- [ ] Most recent two months Checking and Savings account statements including all pages even if the page is blank
- [ ] Most recent two months or quarterly Retirement and/or Investment account statements all pages even if the page is blank

Note: Assets should be enough to cover down payment, closing costs, and post-closing reserves. If receiving gifted funds from a family member, please include a copy of donor's account statement.

Other:

- [ ] Purchase contract
- [ ] Copy of Earnest Money Deposit
- [ ] Title and escrow information
- [ ] Homeowners Insurance Quote