



MORTGAGE DOCUMENT CHECKLIST


NMLS
1477317

Contact Information

Borrower's Name _____

CoBorrower's Name _____

Phone _____ Email _____

Income

W-2 Employee

- ☐ Previous two (2) years W-2 Forms for all borrowers
- ☐ Most recent pay stub for all borrowers (within 30 days)
- ☐ Personal Tax Return

Self-Employed

- ☐ Previous two (2) years Corporate Tax Returns (all schedules)
- ☐ Federal Personal Tax Returns

Disability/Social Security

- ☐ SSI/Pension Current Award Letter

Miscellaneous

- ☐ Current unexpired ID for all borrowers
- ☐ Copy of Visa/Work Permit or Resident Card (Need front and back)
- ☐ Most recent bank statements within 2 months for all accounts (within 60 days)
- ☐ Divorce or child support documents