

Mortgage Loan Processing Initial Document Checklist

- ___ Signed 1003 & Disclosures
- ___ Credit Report
- ___ Driver's License Copy
- ___ Pay Stubs
- ___ W-2's from Last Two Years
- ___ Homeowner's Insurance Declaration Page or Contact Info for Agent
- ___ Most Recent Two Months Bank Statements
- ___ Last Quarterly Statement for Reserves (ie – 401k, Stocks)
- ___ Last Monthly Mortgage Statement
- ___ Purchase Agreement
- ___ Condo / PUD – Association/Management Contact Info
- ___ Divorce Decree
- ___ Bankruptcy Papers

Retired Borrower

- ___ Award Letters for Social Security/Pension/Retirement Income
- ___ Last Two Years of all 1099s

Self-Employed

- ___ Last Two Years of Tax Returns - All Schedules
- ___ Business License or CPA Letter

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