



Home Mortgage Checklist

The following information is usually required during the loan process:

- Your Social Security Number and Driver's license
- 30 days most recent pay stubs and W-2s for the last 2 years
- If self-employed, your complete tax returns for the last 2 years
- Bank statements for the last 2 months
- Investment account statements for the last 2 months
- Retirement account statements for the last 2 months

If you currently own real estate, the following is also usually required:

- Mortgage account information
- Home insurance policy information