

# CHECKLIST

## Your Mortgage Application



Every lender requires documents as part of the process of approving a mortgage loan. Here are documents you're generally required to provide.

- W-2 Tax forms — or business tax returns if you're self-employed — for the last two or three years for every person signing the loan.
- At least one pay stub for each person signing the loan.
- Account numbers of all your credit cards and the amounts or any outstanding balances.
- Two to four months of bank or credit union statements for both checking and savings accounts.
- Lender, loan number, and amount owed on installment loans, such as student loans and car loans.
- Addresses where you've lived for the last five to seven years, with names of landlords if appropriate.
- Brokerage account statements for two to four months, as well as a list of any other major assets of value, such as a boat, RV, or stocks or bonds not held in a brokerage account.
- Your most recent 401(k) or other retirement account statement.
- Documentation to verify additional income, such as child support or a pension.



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