



Loan Appointment Check List

- Paystubs for all applicants for the prior month
- W-2's for all applicants for the most recent tax year
- Tax Returns for all applicants for the prior two years
- Bank statements for prior two months for all deposit accounts and the last quarterly statement covering any investments listed on the application including retirement accounts
- Copy of signed purchase agreement
- Copy of driver's license for all applicants
- Copy of social security card for all applicants
- Divorce Decree (if applicable)
- Alimony / child support documentation (if applicable)
- Death Certificate (if applicable)
- If a refinance, a copy of the most recent year's tax bills (spring and fall)
- A copy of the homeowner's insurance policy if refinancing or prior to the closing if purchasing a new home.

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