

## MORTGAGE APPOINTMENT CHECKLIST

- ✓ Paystubs for all applicants for the most recent one-month period
- ✓ W-2's and/or 1099's for all applicants for the most recent two years
- ✓ Social Security and/or Retirement Award Letters for the current year
- ✓ Personal tax returns, including schedules, for all applicants for the most recent two years
- ✓ Business tax returns for all self-employed applicants, including schedules (most recent two years)
- ✓ Bank statements for the most recent two months for all deposit accounts *\*non-FCCB accounts*
- ✓ Most recent quarterly statements for any investments listed on application, including retirement accounts *\*if being used to qualify for new loan*
- ✓ Copy of signed purchase agreement *\*if applicable, purchase only*
- ✓ Copy of driver's license for all applicants
- ✓ Copy of social security card for all applicants
- ✓ Divorce Decree *\*if applicable*
- ✓ Death Certificate *\*if applicable*
- ✓ Alimony, child support documentation *\*if applicable*
- ✓ If a refinance, a copy of the most recent mortgage statement
- ✓ If a refinance, a copy of the most recent year's tax bills (spring and fall)
- ✓ If a refinance, a copy of the homeowner's insurance policy

*\*\*\* Please bring current mortgage statement, tax bills and homeowner's insurance for all real estate owned and being retained. \*\*\**

