

Documentation Checklist



Required

- Copy of driver's license
- 2 most recent paystubs
- All 2018 and 2017 W2's (and/or 1099's)
- 2018 and 2017 Federal tax returns including all schedules (all pages)
- 2 most recent checking and savings official account statements (all pages)
- 2 most recent retirement account statements
- Contact information for homeowners insurance agent
- Copy of earnest money check (purchases only), and proof it was cashed

If Applicable

- Copy of your settlement statement from when you purchased the property
- Most recent mortgage statement (for refinances or other property owned)
- Copy of current mortgage notes
- Full divorce decree
- 2018, 2017, 2016 Business tax returns including all schedules
- Most recent social security/pension income awards letter with documentation confirming at least a 3 year continuance
- First time homebuyer class
- College transcripts
- Bankruptcy papers

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