

documentation checklist



Required

- Copy of driver's license
- 2 most recent paystubs
- 2 most recent W2s (and/or 1099's)
- 2 most recent 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 (all pages)
- Contact information for homeowners insurance agent

If Applicable

- Copy of earnest money check once it's cleared (purchases only)
- Copy of your settlement statement from when you purchased the property (refinances only)
- Most recent mortgage statement (refinances or other property owned)
- Full divorce decree & child support orders
- 2 most recent Business tax returns including all schedules and K1s
- Most recent social security/pension income awards letter
- First time homebuyer class (MSHDA, and 3% down Conventional Loans)
- College transcripts (unofficial ok, only if within last 2 years)
- Bankruptcy papers (only if within last 7 years)

Jenny Wagner

616.325.5856

JennyW@treadstonemortgage.com

210 Fulton Street E

Grand Rapids, MI 49503

www.treadstonemortgage.com

Jenny Wagner NMLS 1706898 | Treadstone Funding propelled by Neighborhood Loans NMLS 222982

