

# 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 earned 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)

Max Polakovich  
616.774.9506  
MaxP@treadstonemortgage.com

210 Fulton Street E  
Grand Rapids, MI 49503  
www.treadstonemortgage.com

Max Polakovich NMLS 2085922 | Treadstone Funding propelled by Neighborhood Loans NMLS 222982

