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)

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