

# Documentation Checklist for Mortgage Applications

You will be required to provide one of the following items at application:

- Driver's License or State ID     Government or Military ID     Passport

To help us serve you better and more efficiently, we have developed this checklist. Your attention to the items listed on the checklist will make the mortgage approval process faster and easier.

- Purchase & Sale agreement **signed by both the buyer and seller** - when available
- A copy of the legal description of the subject property (Warranty Deed) - when available
- A property-listing sheet that can be obtained from your realtor - if a purchase
- Four weeks of **most current pay stubs** and prior two years' **W-2s and/or 1099s** for all sources of income
- Copy of Divorce Decree or Separation Agreement to establish liabilities and/or income
- Past two years signed individual tax returns including all schedules
- Rental Income - Include copies of leases
- Dividend, Interest, Overtime, and Bonus Income
- Alimony and Child Support\* - Copy of the divorce decree & deposit receipts or cancelled checks for income
- Copy of the earnest money check and **complete statement (all pages)** showing the check clearing your account
- Self-Employed - Prior two years' signed corporate and/or partnership returns if ownership exceeds 25%
- Self-employed - current year to date Profit and Loss Statement
- Current 2 months bank statements **all pages** for all checking, savings and investment accounts
- If you are making property improvements, please provide a copy of all estimates for work to be completed
- Copy of most recent property tax bill and homeowner's insurance policy for all properties owned
- Construction loan: Additional information is required -- please speak to your mortgage lender for more information.



Partners.Bank  
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\*Alimony, child support or separate maintenance income need not be revealed if the Borrower or Co-Borrower does not choose to have it considered as a basis for repaying the loan.



Equal Housing Lender

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