

Mortgage Checklist



Banking Made Easy

Whether you're a first-time homebuyer or are searching for your next home, get a head start on your mortgage application. Use this checklist to make the loan process less of a process.

Pre-Approval & Loan Application

W-2 statements from the past two years

Recent pay stubs

Asset documents – most recent two months' statements (checking, savings, investment account information, documentation for 401(k) loans)

Existing Homeowners

Current mortgage statement

Tax bill

Homeowners insurance

HOA dues (if applicable) for any properties owned

Self Employed

Year-to-date profit and loss statement

Two years of business and personal tax returns



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