

# 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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