



MORTGAGE APPLICATION CHECKLIST

Please return a signed copy of the enclosed disclosures along with the following documentation:

- _____ 1. Completed Application
- _____ 2. Credit Report Fee to be submitted at time of application
- _____ 3. Contract of Sale
- _____ 4. Legal Description of Property (Copy of Deed)
- _____ 5. Proof of Income:
 - a. W-2 (2 years)
 - b. Tax Return (2 years, most recent, all schedules)
 - c. Copy of recent pay stub
 - d. Copy of recent savings account, checking account, stock & bond accounts, and retirement account statements.
 - e. Copy of court order (for alimony/child support)
 - f. Personal financial statements
 - g. Gift letter (if applicable)
 - h. Copy of leases for rental property (rent rolls)
- _____ 6. Copy of most recent tax bills (town, village, & school)
- _____ 7. Copy of Homeowner's Insurance Policy
- _____ 8. Copy of most recent survey
- _____ 9. Copy of most recent title insurance policy
- _____ 10. Copy of Certificate of Occupancy or pre-date letter
- _____ 11. Copy of Driver's License for all borrowers (if none, copy ID)
- _____ 12. If Construction: (1) Contractor work estimates
(2) Blue Prints
(3) Survey
- _____ 13. If Refinance: Copy of Current Mortgage Statement.
- _____ 14. Buyer's Attorney's name, address, and phone number:

