



## **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:

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