

## MORTGAGE INFORMATION CHECKLIST

### I. Income information

#### A. Self-Employed Borrowers

1. Last 2 years' Signed Tax Returns
  - a. individual (form 1040)
  - b. corporate / partnership
2. YTD Profit and Loss Statement

#### B. Salaried Borrowers

1. Last 2 years W-2 Forms
2. Last 1 month's Pay Stubs

### II. Asset Information

- A. Last 2 month's Asset Statement (Checking, Savings, IRA, Stock & Bond Accounts, Mutual Funds, Etc.)-All Pages
- B. Gift Letter with bank statement from giver and deposit slip / bank statement from recipient

### III. Purchases only

- A. Contract of Sale
- B. Copy of Canceled Down Payment Check (front and back)
- C. Copy of (i) last 12 months Canceled Rent Checks (front and back) or (ii) letter from landlord that rent has been paid on time and amount paid.

### IV. House Re-Finances Only

- A. Copy of First Two Pages of Homeowner's Insurance Policy

### V. Co-op Loans Only

- A. Last 2 years Co-op/Condo Financial Statements
- B. Last Amendment to Offering Plan (if sponsor owns 10% or more of units, Co-ops only)
- C. Questionnaire, if applicable

### VI. Additional Items

A. \_\_\_\_\_

B. \_\_\_\_\_

C. \_\_\_\_\_

