



Mortgage Appointment Documentation

Below are the documents you'll need to assist in closing your mortgage loan promptly:

Residential Mortgages:

Paystubs (Last 30 days)
W-2s (Last 2 years)
Tax Returns (Last 2 years)
Bank Statements (Last 3 months)
Mortgage Statement
Stocks, Bonds, 401ks, IRAs
Other Real Estate (tax and insurance information)

For Refinancing Add:

Title Policy
Copy of Survey
Homeowners Insurance Policy

If Applicable:

Bankruptcy Discharge
Separation or Divorce Decrees