



THESE ITEMS ARE VERY IMPORTANT!

Please use the following checklist to help organize the documentation that will be needed for your mortgage application

1. Copies of W-2 forms and Federal Tax Returns for the last (2) two years, (YTD P&L and Balance Sheet for self employed income)
2. Copies of pay stubs covering the most recent 30 days
3. Bank, brokerage or other deposit account statements (entire statements, all pages) for the past (2) two months.
4. List of any Debts (monthly payments, including existing mortgage payment, and balances.
5. Copy of fully executed Contract to Build (for new construction)
6. Copy of fully executed Sales Contract (if purchasing)
7. Copy of Deed , Survey and property tax receipts (if refinancing)

You may call anytime to schedule an application appointment. We look forward to extending our service to you throughout this transaction.

**Residential Mortgage Department
716 926-2000**