

## Before you apply

professional advice. We recommend that you seek professional advice

with respect to your specific situation.

Use the following checklist to help you ensure that you have prepared all of the documents and information that may be required to apply for a Mortgage Loan.

| Employment History   | Residence History   |
|--|---|
| Name and address for all employers in the last 2 years   | Previous addresses for the last 2 years and how long you lived at each location   |
| Dates of employment for each employer  | If you currently rent: your landlord's name, address and phone number to verify your recent rental history, or 12 months of canceled rent checks. |
| Letter explaining any gaps in your employment in the last 2 years  |   |
| Pay stubs for the last 30 days   | Carrier and Characterian and  |
| W2s for the last 2 years   | Savings, Checking and Investment accounts   |
| 1040s for the last 2 years   |   |
| Year-to-date profit and loss statement and current balance sheet   | Checking/Savings accounts: 2 most recent monthly statements (all pages)   |
| (if self-employed)  Award letter and copy of most recent   | 401K/Retirement accounts: most recent   |
| check for retirement, Social Security or disability income   | guarterly statements (all pages)  Stocks/Mutual Funds: 2 most recent monthly statements (all pages)   |
| For Refinancing  |   |
| <del></del>  |   |
| Copy of most recent property tax bill  |   |
| Copy of most recent homeowner's insurance bill   |   |
| Copy of most recent mortgage statement or coupon book  |   |
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