



# Mortgage Application Document Checklist

	Borrower	Co-Borrower(s)
<b>Personal Information</b>		
Copy of Driver's License	<input type="checkbox"/>	<input type="checkbox"/>
<b>Current Housing Information</b>		
<b>For Renters:</b>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Current Address	<input type="checkbox"/>	<input type="checkbox"/>
▪ Name and Address of Your Landlord	<input type="checkbox"/>	<input type="checkbox"/>
▪ Proof of Lease	<input type="checkbox"/>	<input type="checkbox"/>
▪ Current Monthly Rent Payment	<input type="checkbox"/>	<input type="checkbox"/>
If you've haven't lived at your current address for more than 2 years, bring this information for your previous address too	<input type="checkbox"/>	<input type="checkbox"/>
<b>For Existing Homeowner</b>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Current Address	<input type="checkbox"/>	<input type="checkbox"/>
▪ Current Home Owners Insurance	<input type="checkbox"/>	<input type="checkbox"/>
▪ Copy of Past 3 months of Mortgage Statements	<input type="checkbox"/>	<input type="checkbox"/>
<b>Current Employer Information</b>		
<b>Employment Verification</b> Names, address, and telephone numbers of employers for the past 2 years.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Self-Employment Documents</b> If self-employed, copies of the following from the past two years:	<input type="checkbox"/>	<input type="checkbox"/>
▪ Profit and Loss Statement	<input type="checkbox"/>	<input type="checkbox"/>
▪ Balance Sheet	<input type="checkbox"/>	<input type="checkbox"/>
▪ 2 Years Business Tax Returns	<input type="checkbox"/>	<input type="checkbox"/>
<b>Financial Information</b>		
<b>Income Verification</b>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Two Most Recent Pay Stubs with Year-to-Date Earnings	<input type="checkbox"/>	<input type="checkbox"/>
▪ W-2s for the Past Two Years	<input type="checkbox"/>	<input type="checkbox"/>
<b>Additional Income</b> Bring documentation to prove you receive any of these additional forms of income: social security or veteran's benefits (provide copies of the award letter), overtime bonuses, commissions, interest income	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tax Information</b> Copies of the following from the past 2 years of:	<input type="checkbox"/>	<input type="checkbox"/>
▪ W-2 Tax Forms	<input type="checkbox"/>	<input type="checkbox"/>
▪ Tax Returns (If Self-employed or own rental properties)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Bank Account Information</b> Two Months Full Bank Statements for:	<input type="checkbox"/>	<input type="checkbox"/>

<ul style="list-style-type: none"> <li>▪ Checking</li> </ul>		
<ul style="list-style-type: none"> <li>▪ Savings</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>▪ Any Other Account(s)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Assets Information</b> Statements of current assets, such as Individual Retirement Accounts (IRAs), Certificates of Deposit (CDs), stocks, and bonds.</p> <p>For individual investments, a current brokerage statement with the name of the stocks, the amount per share, and the number of shares owned.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Credit Information</b> Credit card bills for the past few billing periods (ONLY If requesting payoffs).</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Gift Fund</b> If money for the down payment is a gift from a relative, supply a copy of:</p> <ul style="list-style-type: none"> <li>▪ Gift letter (stating the gift money does not have to be repaid)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>▪ Copy of Cleared Gift check</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Divorce or Separation Information</b> A copy of the divorce decree or maintenance agreement, along with any amendments and a 12-month payment history of alimony and/or child support payments, as well as documents if the payments are needed to verify your income and qualify for the mortgage.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Information on the Home you are Purchasing</b>		
<p><b>Purchase Contract</b> Copy of the executed purchase contract and any addendums. (If purchasing new construction, also include the plans and specifications.</p>	<input type="checkbox"/>	<input type="checkbox"/>

122 N. Main St. Magnolia, OH 44643 330.866.9392	10045 Cleveland Ave. SE Magnolia, OH 44643 330.866.9326	3221 Cleveland Ave. SW Canton, OH 44707 330.484.7400
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