

LOAN CHECKLIST FOR MEMBERS

When applying for a mortgage, general and personal information is needed to process and approve your loan request. Please see the list below for the documents that will be required for any residential mortgage loan. Please also note that the list below is likely not the entirety of what will be required, due to circumstances specific to you and your transaction.

Income Documentation:

- 30 Days Most Recent Paystubs-showing year to date earnings (All Borrowers)
- W-2 or 1099 forms-most recent two years (All Borrowers)
- IF YOU ARE SELF EMPLOYED, please also send 2 years personal FEDERAL tax returns any applicable business returns and copies of your K-1's.

Assets:

- List of assets, including bank statements, mutual fund statements, brokerage statements and records of other investments or assets, AS APPLICABLE.
- 60 days' worth of statements (Credit Union, Bank, or both) for all accounts you may need to document.

Miscellaneous:

- Current mortgage statement
- Homeowners insurance agent (name and phone number)
- Copy of Driver's License(s)
- Bankruptcy docs (if applicable)
- Full Divorce decree and separation agreement (if applicable)