

## Mortgage Checklist

**The following information is usually required during the loan process**

- Your Social Security number
- Current pay stubs, tax return, and w-2 for the past two years
- If self-employed, your tax returns for the past two years and current profit and loss
- Investment account statements for the past two months
- Bank statements for the past two months
- Retirement account statements for the past two months
- Credit card account information
- Auto loan account information
- Personal loan account information

**If you currently own Real Estate:**

- Mortgage account information
- Home insurance policy and property tax information
- Home equity account information (if applicable)