

# MORTGAGE PAPERWORK CHECKLIST



As part of our VIP Home Buyer System we will assist you in getting funded, researching best homes scheduling showings and connecting you with trusted professionals. In addition, we will manage paperwork, negotiate contracts, and track deadlines.

*“We Prepare You to Win! Then Craft  
Strong Offers and  
Negotiate the Best Terms”*



## Initial Paperwork Request Checklist

### IDENTIFICATION:

- Copy of Driver's License
- Copy of Front/Back of Permanent Resident Alien Card (if applicable)

### INCOME:

If you are Salaried:

- Complete 30 days of most current pay stubs
- Most Recent 2 Years W-2's
- Most Recent 2 Years Complete Federal Tax Returns (all pages/schedules)

If you are Self Employed:

- Most Recent 2 Years Complete Federal Tax Returns (all pages/schedules)
- Most Recent 2 Years 1099's (if applicable)
- Most Recent 2 Years K-1's (if applicable)
- If More than 25% Ownership Interest in Company - Most Recent 2 Years Complete Business Tax Returns

If you are Retired:

- Social Security Award Letter (if applicable)
- Pension Award Letter or Monthly Paycheck (if applicable)
- Most Recent 2 Years W-2's/1099's
- Most Recent 2 Years Complete Federal Tax Returns (all pages/schedules)

# Initial Paperwork Request Checklist

## ASSETS:

- Most Recent 2 Months of Bank Statements (all pages)
- Most Recent 2 Months/Quarter of Stock, Retirement, etc., Statements (all pages)

## PROPERTY(all property owned):

- Current Mortgage Statement(s)
- Current Hazard Insurance Declarations Page
- If Property has an HOA Payment - HOA Payment Coupon and Master Insurance Policy
- If Property being financed is an Investment - Current Signed Rental Agreement



LOVE YOUR PURCHASE  
**GUARANTEED**  
OR I'LL SELL IT FOR  
ZERO LISTING FEE\*

954.240.9680



Liz Dawes