

**MORTGAGE DOCUMENT  
CHECKLIST  
FOR PURCHASES**



***Please provide clear COPIES of the following:***

- Valid photo ID (driver's license, passport, green card, alien card)
- Paycheck stubs for last thirty (30) days  
(Must have year-to-date figures and your name and address)
- W-2's for last two (2) years
- Most recent two (2) months banks statements on all checking and saving accounts, ALL pages (even those left blank)
- Most recent statement (last month or last quarter) for any investment accounts, ALL pages (such as 401k, IRA's, life insurance, etc.)
- Copy of purchase contract, with all signatures and addendums  
(ask your real estate agent to fax directly to me)
- Name and telephone number of homeowner's insurance agent  
(when you choose one)
- Check made out to "1<sup>st</sup> Residential Funding" for \$ \_\_\_\_\_ for appraisal

**If you are Self-Employed or on Commissioned Income, please also provide:**

- Personal and Corporate tax returns with all schedules for last two (2) years
- Current Profit and Loss statement and Balance sheet

**If you are Retired, please also provide:**

- Proof of pension or annuity income
- Current year's statement of Social Security Income

**If applicable, please also provide:**

- Final Divorce Decree and Property Settlement Agreement

**Other:**

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**If you have any questions please call your Loan Officer at 407-977-5656!**