

Mortgage Application Checklist



The items listed below are the standard supporting documents and information commonly needed for loan approval. However, individual circumstances may dictate that additional information is required.

Income Documentation	Asset Documentation	Additional Information
<ul style="list-style-type: none"><input type="checkbox"/> W-2 Tax Forms - Copy of 2 most recent years<input type="checkbox"/> IRS 1040s - Copy of 2 most recent years, all schedules<input type="checkbox"/> IRS 1120s & K1s - For self-employed borrowers and consumers<input type="checkbox"/> YTD Profit and Loss Statement if applicable<input type="checkbox"/> Paystubs - Copy of 2 most recent for salaried employees<input type="checkbox"/> Employment Verification - Names, addresses, and phone numbers of employers for the past 2 years<input type="checkbox"/> Rental Leases - If owner of investment property	<ul style="list-style-type: none"><input type="checkbox"/> Bank Statements - All pages of 2 most recent months<input type="checkbox"/> Brokerage Statements - All pages of 2 most recent months or current quarter<input type="checkbox"/> Retirement Statements - All pages of 2 most recent months or current quarter<input type="checkbox"/> Other Personal Property - Documentation to verify the value of personal property which can include life insurance, cars, etc.<input type="checkbox"/> Liabilities - Auto loans, student loans, credit cards, and other installment debt. You will need to provide the name and address of each creditor and the monthly payment and total amount due	<ul style="list-style-type: none"><input type="checkbox"/> Birth Date - For all borrowers and co-borrowers on the loan<input type="checkbox"/> Social Security Number - For all borrowers and co-borrowers on the loan<input type="checkbox"/> Previous Addresses - Property address, name and address of the landlord; current monthly rent; and previous addresses/landlords if you've lived in your current address for less than 2 years<input type="checkbox"/> Agreement to Purchase - A signed copy and any amendments, a copy of the listing form for the property, the legal description of the property, and receipt for earnest money or down payment deposits (if applicable)



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