



## Financial Documentation List

*Revised: 7/30/2018*

**Below are the minimum documents you should provide when applying for a mortgage. Your lender may require additional documents.**

- Copies of paystubs for each applicant, reflecting a minimum of 30 days income
- The most recent 2 years tax returns
- W-2's for the past two years
- Names and Addresses of employers for the past two years
- All recent Bank Statements for the past 2-3 months
- Other Assets (insurance, stock, etc).
- If self-employed, a year to date profit and loss statement, and signed tax returns for the past two years
- Proof of any other income;
  - Bonuses
  - Pension
  - Social Security
  - Disability
  - Other
- Information on Liabilities;
  - Credit Cards
  - Student Loans
  - Other Consumer Debt
- Social Security number
- Property Address
- Estimated Value of the Property
- Mortgage Loan Amount sought