

Financial Records Checklist



When you apply for a mortgage loan, your lender will ask for information and various financial documents. Gathering these documents prior to applying for a home loan will help make the process go smoother.

Following is a list of documents and information usually required during the home loan process:

- Your Social Security number
- Current pay stubs or, if self employed, your tax returns for the past two years
- Bank statements for the past two months
- Investment account statements for the past two months
- Retirement account statements for the past two months

If you currently own Real Estate you'll need:

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

