

Mortgage Application Checklist

Property to be Mortgaged

Copy of Purchase Agreement
Copy of Sale Agreement (if you are doing both)

Income

Two Year history of your employment income (employers, dates, wages, income tax statements if self employed)
Other Income that you wish to include (documentation)

Assets

Information on Checking & Savings Accounts (institution, account number, amount)
Information on other Semi-liquid Assets (CDs, IRAs, Stocks & Bonds)
Information on long-term Assets (Trust Deeds, Contract Investments)
Information on other Real Property (address, value, date purchased)

Debts

Current Mortgage information on All Properties (company, account number, address, phone, origination date, payment size, amount paid off and owed)
Credit Cards / Charge Accounts (company, account number, balance)
All other outstanding debts (Lines-of-Credit, Private unsecured loans, Auto, etc)

Documentation

For FHA loan: Social Security Card, Photo ID
For VA: Certificate of Eligibility or DD214
Employment Relocation: Offer, Promissory note, Bridge Loan, Relocation documentation

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