

MORTGAGE CHECKLIST

MORTGAGE | HELOC | REFINANCE

This checklist is to help you gather items we will need to complete your mortgage application along with the [ANECA.org/Prequal](https://www.aneca.org/Prequal) form.

Depending on your unique situation, we may need additional documents and information.

- Copy of your most recent year-to-date pay stubs to show your last 30 days of income
- W-2 Statements from the past 2 years
- Signed personal & business tax returns from the past 2 years
- If self-employed, a copy of the most recent quarterly or year-to-date profit/loss statement
- 2 Most recent bank statements for all accounts including: checking, savings, IRA, 401(k) & brokerage accounts
- Most recent monthly statements for any mortgages, including your most recent tax bill & insurance statements
- Driver's license & social security card



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Federally Insured by NCUA. Membership and approved credit are required. Rate based on your credit worthiness. NMLS# 403632.