



Mortgage Application Checklist

DOCUMENT CHECKLIST

Please provide the following information to expedite the process of your mortgage loan application:

1. Copies of Driver's License and Social Security card for all applicants.
2. Employment pay stubs for the last 30 days reflecting year-to-date totals.
3. Previous 2 years of tax returns including W-2s, 1099, etc.
4. Obligation to pay child support/alimony, copy of divorce decree or other agreement (if applicable).
5. Copy of bank statements, IRA, 401k, or Profit Sharing account statements of funds needed for closing.
6. Copy of Sales Contract (if available or applicable).
7. Legal description of Property (i.e., copy of Deed of Trust, Tax Receipts, or Survey).
8. Copy of current survey.
9. Name and phone number of Insurance Agent of your choice or copy of your current Homeowners Insurance policy.
10. **For Refinances:** name of Mortgage Lender with loan account number and phone number for Loan Servicing Department.

In addition to the above listed items, the following will also be needed for Construction/Home Improvement loans:

- Contractor's name, address, and telephone number
- Building plans and specifications
- A list of subcontractors and suppliers

Please be advised that your Contractor is required to be registered with the Texas Residential Construction Commission for any type of construction project over \$10,000.00.