



# Home Financing Checklist

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- Current paystubs and W-2's for the past two years
- History of employment for the past two years
- Other income sources
- Complete information - names, addresses, numbers and balances - regarding the following:
  - Checking accounts
  - Savings accounts
  - Credit Unions
  - Retirement accounts - IRA, 401k and Keogh
  - Investment and stock accounts
  - Monetary gifts
- Complete information - names, addresses, numbers and balances - regarding the following:
  - Current mortgages
  - Auto loans
  - Charge accounts
  - Personal loans
  - Student loans
  - Alimony and child support

If you are self-employed or a commissioned-employee, you may be required to provide the following as well:

- Copies of federal tax returns from the past two years
- Current balance sheet
- Recent profit & loss statement