

# REQUIRED DOCUMENTS



The list of documents below provides a general overview of the typical requirements for initiating the mortgage process. While every situation is unique, these items are commonly needed for loan review and approval.

- ☐ Driver's license or government issued photo ID
- ☐ Most recent paystubs covering 30 day period
- ☐ Documentation of income received, if self-employed or retired
- ☐ W-2 and/or 1099 forms for past two years
- ☐ Federal tax return for the past two years with all schedules attached
- ☐ Bank, investment and retirement account statements (all pages) for previous two months or most recent quarterly statement.
- ☐ Current mortgage statement, declaration page of current homeowner's insurance, and evidence of HOA or condo dues, if applicable.

If you have any questions about these documents or the mortgage process, please don't hesitate to contact our team. We're here to help and happy to provide guidance whenever you're ready to take the next step.



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