Mortgage Loan Supporting Documents Checklist

Thank you for choosing our credit union for your mortgage needs. Please provide copies of the following documents and send them with your completed mortgage application and signed Consumer Authorization. Thank you.

Application
- A completed mortgage application
- A signed Consumer Authorization
- Copy of one of the following: Driver’s License or State ID

Income Documents
- Recent pay stubs covering one month
- Previous 2 years of taxes or W-2’s
- If you are self-employed, receive commission income or own rental property, include most recent two years’ tax returns with all schedules.

Subject Property-Refinance
- Copy of Homeowner’s Insurance with the name and phone number of your insurance agent.
- Name of institution, account number and phone number of your present mortgage holder(s).
- Copy of Tax Bill

Subject Property-Purchase
- Copy of sales contract
- Attorney information

Assets
- Copies of recent savings and checking bank statements covering two months
- Recent statement of your 401(k) savings plans, IRA’s, CD accounts, investment portfolio, money market accounts covering two months