

Documents You Will Need for Your Loan ▶▶▶



New Mortgage provides you with resources - like the Loan Document Checklist below - to make obtaining a home loan as smooth and simple as possible for you.

As part of completing the loan process, here are the supporting financial documents that you will be required to provide (other documentation may also be required):

- ❑ Copies of most recent two years' federal tax returns with ALL schedules (2014 and 2015)
- ❑ Copies of most recent two years' W-2 statements and/or 1099 statements (2014 and 2015)
- ❑ Copies of all paystubs for the last 30 days (showing your name and year-to-date earnings)
- ❑ Copy of your driver's license and Social Security card (i.e., two forms of identification)
- ❑ Copies of most recent two months' bank/asset statements
 1. Must include ALL pages; i.e., if page 1 says 1 of 7, then we need all 7 pages
 2. Must be bank-generated statements that include your name, account number, and the bank's name
 3. CANNOT be transaction history printouts from accessing your account unless they include the information provided in #2
 4. Examples of other asset statements to provide: stocks, 401(k) plan, retirement accounts, mutual funds
- ❑ If self-employed: provide:
 1. Copies of most recent two years' business tax returns with ALL schedules
 2. Copies of most recent two years' K-1s/1099s/W-2s
 3. Copy of your business license and unaudited year-to-date profit and loss statement, if applicable
- ❑ If you have rental property: Provide copy of current rental agreement and your most recent two years' tax returns with ALL schedules
- ❑ If divorced: Provide final divorce papers, including child support/alimony agreement and final decree (signed by the court) and all revisions

Please contact your New Mortgage loan officer with any questions or concerns.



Sean Harrington

Loan Officer

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