



Worksheet: necessary paperwork

This is a list of documents to get together before you contact a mortgage lender.

Checklist

- W-2 forms from the previous two years.
- Federal tax returns from the previous two years.
- Recent paycheck stubs
- Documents showing other sources of income, which could include second jobs, overtime, commissions and bonuses, interest and dividend income, Social Security payments, VA and retirement benefits, alimony and child support.
- A complete list of your creditors, such as credit cards, student loans, car loans and child support payments, along with minimum monthly payments and balances.
- Investment records including mutual fund statements, real estate and automobile titles, stock certificates and records of any other investments or assets.
- Canceled checks for your rent or mortgage payments.