

# Morty

# Mortgage Application Checklist



## Financial documents

- Two most recent W-2s
- Paystubs for the last month
- Most recent tax return
- Checking account balance and statements
- Savings account balance and statements
- Investment or retirement account balance and statements\*
- Balances and most recent statements for credit cards, student or auto loans, or any other debt
- Proof that cash gift doesn't need to be repaid\*
- Documentation for any additional debt or obligations (child support, alimony, etc.)
- Cancelled rent checks for the last year (if you've been renting)

## ID, legal, and other documents

- Photocopy of your state-issued ID, driver's license, and/or passport
- Copy of your Green Card (for non-citizen permanent residents)
- Copies of final divorce decree, bankruptcy discharge, or any other legal judgements\*
- Copy of your Certificate of Release or Discharge from Active Duty (for veterans)
- Titles for any assets you currently own (this includes vehicles)

\* *if applicable*

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## For business owners/self-employed:

- Tax returns for yourself and your business for the last two years
- Profit & loss statement for the current year