



1373 BROAD STREET, SUITE 312
CLIFTON, NEW JERSEY
(973) 574-0900 TEL
(973) 574-0999 FAX

MORTGAGE INFORMATION CHECKLIST

Please Provide Items That Are Circled/Highlighted

I. Income Information

A. Self-Employed Borrowers

1. Last one/two years' Signed Tax Returns
 - a. Individual (*IRS form 1040*) Years: _____, _____
 - b. Corporate / Partnership Years: _____, _____
2. YTD Profit and Loss Statement

B. Salaried Borrowers

1. Last two years' W-2 Forms
2. Last one month's Pay Stubs

II. Asset Information

- A. Last 2 month's Account Statements (*Checking, Savings, IRA, Stock & Bond Accounts, Mutual Funds, Retirement, etc.*)- **All Pages**
- B. Gift Letter with bank statement from giver and deposit slip / bank statement from recipient

III. Purchases Only

- A. Contract of Sale
- B. Copy of Canceled Down Payment Check (*front and back, when available*)
- C. Copy of (i) last 12 months Canceled Rent Checks (front and back) or (ii) letter from landlord that rent has been paid on time and amount paid.

IV. House Re-Finances Only

- A. Copy of existing Deed, Survey, and Title Insurance Policy
- B. Copy of First Two Pages of Homeowner's Insurance Policy
- C. Most Current Mortgage Statement

V. Co-Op Loans Only

- A. Last 2 years Co-op/Condo Financial Statements
- B. Last Amendment to the Offering Plan (*if sponsor owns 10% or more of units, Co-ops only*)
- C. Copy of Stock Certificate (*Refinance Only*)
- D. Questionnaire, if applicable

VI. Additional Items

- A. Two (2) forms of I.D. (one must be a PHOTO ID, i.e. driver's license or passport) _____
- B. Name and telephone number of your accountant _____
- C. _____
- D. _____