

HOME LOAN DOCUMENT CHECKLIST

W-2 Income

- W-2's for 2023 and 2022
- Personal Federal Tax Returns (all pages) for 2023 and 2022
- Paystubs- most recent 30 days' worth or 3 stubs
- Most recent 2 months bank statements (all pages)
- Most recent quarterly statement (all pages) investment, 401k or retirement accounts
- Copy of your driver's license or other non-expired government issued ID

Refinance

- Copy of current mortgage statement
- Homeowners Insurance Declaration Page and/or Insurance Agent's Name and Phone Number

Gift Funds

- Notify us as soon as possible if you expect to receive gift funds from a relative or others



Brantley Mortgage Team

Self-Employed Borrowers

- Business Federal Tax Returns (all pages), complete with all schedules for 2023 and 2022
- Personal Federal Tax Returns (all pages) for 2023 and 2022
- Paystubs- most recent 30 days' worth or 3 stubs (if applicable)
- Most recent 2 months bank statements (all pages) for personal accounts
- Most recent 2 months bank statements (all pages) for business accounts if using funds from this account for closing
- Most recent quarterly statement (all pages) investment, 401k or retirement accounts
- Copy of your driver's license or other non-expired government issued ID
- Copy of current year business license

Miscellaneous Items

- If Divorce/Alimony- please provide the divorce decree or agreement
- Multiple properties owned- provide mortgage statements, homeowner's insurance and tax statements on all properties

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