



# DOCUMENT CHECKLIST

The following is a list of typical items needed for your mortgage application. These items are required depending upon the type of mortgage program selected. Providing these documents quickly to your loan officer can help speed up the application process.

- All W-2's for the last two years
- Pay stubs covering the past 30 days
- Please send all pages of 1040s for the last two years. OR a copy of extension, if you have not filed for taxes this year.
- Two most recent statements for checking, savings or other asset accounts (all pages, even if blank)
- If condominium, please provide Condo Management name & phone number
- A copy of your mortgage note(s) from your current lender (refinance only) and a copy of your HUD from closing
- If purchase, verify source of offer and purchase & sales deposit given to agent (copy of checks)
- Current mortgage statements for all properties/mortgages
- If applicable, please provide evidence of tax and insurance bills on rental property. If property is a condominium, also provide evidence of condo fee.
- If applicable, please provide divorce decrees, separation agreements, and any information regarding alimony and/or child support obligations.
- Photo ID, Green Card, or Permanent Resident Alien Card

In addition, if you know of anyone who is purchasing or refinancing a home in the near future who would appreciate the level of service and knowledge offered by our team, please have them contact me at 978-273-3227 or visit my personal website at [www.billnickerson.com](http://www.billnickerson.com)

**Bill Nickerson**  
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