



## PURCHASE CHECKLIST

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### INCOME DOCUMENTS

- Last 30 days of paystubs
- Last 2 years of W-2s
- Award Letters (social security, pension, disability, etc.)

### ASSETS DOCUMENTS

- Last 2 months of bank statements (all pages) for checking & savings
- Last quarterly statements for any retirement and/or investment accounts
- CD from sale of your current home (if applicable)

### IF YOU'RE SELF EMPLOYED, OWN OTHER PROPERTY OR MAKE THE BULK OF YOUR INCOME IN COMMISSIONS

- Last 2 years personal tax returns, all schedules
- Business returns could be requested additionally
- CPA to provide a Current Year Profit & Loss statement for self-employed borrowers

### ADDITIONAL INFORMATION

- Purchase contract (fully executed)
- A copy of your Driver's License
- The name and number of your insurance agent
- Bankruptcy discharge paperwork (if applicable)
- Copy of divorce decree or court order to support alimony and/or child support  
(Whether receiving or paying)