Thank you for your interest in working with The Mortgage Planner. The following is a list of items we need initially to start your mortgage process:

I will need copies of the following when we meet to get signatures on the credit application:

- Most recent filed 2 years 1040 personal tax returns with all schedules
- Most recent 2 years W-2's
- Most recent company tax returns and/or K1 forms for any partnerships
- One month's most recent paystubs
- 3 months personal checking account (all pages, front and back)
    - Please document any large deposits other than payroll by providing a copy of the cancelled check & deposit slip
- Copy of savings account 60 days activity
- Any IRA or 401K statements (all pages, front and back)
- Photo ID (Driver's License or Passport) please increase copy size if possible
- Proof of any property tax amounts that you currently own
- Proof of homeowners insurance yearly amount on any property you currently own
- Any lease agreements for any property currently owned.
- Copy of a recent mortgage statement on any property you own with a lien(s)
- Divorce decree (if applicable last 10 years)
- Bankruptcy petition & discharge papers (if applicable last 10 years)

These documents can be delivered in person and I can make copies, or please feel free to fax, email or overnight with a tracking number. If you have any questions let us know.

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