

Application Checklist

In order to provide a quick response to your mortgage application, please bring the following items (if applicable) with you when you meet with us. If you have any questions, contact us and we will help you determine which items will be needed.

Property Information (purchase)

- Original purchase agreement on your new home - signed & dated (not necessary for pre-approvals)
- Purchase agreement on your existing home (if you are selling a home)
- Estimated net proceeds worksheet on existing home sale (if applicable)

Property Information (refinance)

- Association Info.
- Copy of current property tax statement

Applicant(s) Information

- Social Security Number(s)
- Driver's license or photo ID(s)
- Current and previous addresses covering past two years (name and address of all landlords, if applicable)
- Bank/Investment/Retirement statements for all accounts for past two months
- Creditor name, account numbers and payment amounts on all mortgage/installment loans/ credit cards

Income Information

- Employment history for past two years – name and address of employer(s)
- Paystubs covering the last 30 day period
- W-2s (and 1099s if applicable) for last two years
- If self-employed or paid on commission
 - Federal Tax Returns for last two years
 - 1040s • W-2s • 1099s • K-1s
 - Partnership Returns (if ownership interest 25% or greater)
 - S-Corporation Returns (if ownership interest 25% or greater)
 - US Corporation Returns (if ownership interest 25% or greater)

Other

- Copy of Divorce Decree
- Abstract of Title or Torrens Certificate
- Copy of Bankruptcy Papers
- Social Security Award Letter
- Pension Income Information
- Homeowners Insurance Agent Information
- Sworn Construction Statement (new construction only)

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