



GREEN BELT
BANK & TRUST

Your Mortgage Checklist

Use this checklist to help gather the documents commonly requested during the mortgage process. You are not required to provide these documents until after receiving your initial loan disclosures.

If you have questions about any of the documentation listed below, your mortgage lender is happy to help!

Income Information

- ☐ Three months of most recent paystubs
- ☐ Two years of W-2s and 1099
- ☐ Employment contract or offer letter (if starting a new job)

If You Earn Commission Income

- ☐ Two years of W-2s and 1099

If You Are Self-Employed

- ☐ Last two years of tax returns
- ☐ Current year profit & loss statement

If You Receive Social Security or Pension Income

- ☐ Annual award letter
- ☐ Two recent bank statements showing direct deposits

Asset Information

- ☐ Two months of bank statements for checking/savings accounts

If Using Gift Funds for Down Payment

- ☐ Signed gift letter
- ☐ Proof of deposit prior to closing

Additional Asset Accounts

- ☐ Two recent retirement, stock, or bond account statements

If Selling a Home

- ☐ Purchase agreement for current property
- ☐ Closing Disclosure once sale is finalized

Earnest Money Deposit

- ☐ Copy of front and back of deposited earnest money check

Insurance & Other Documents

- ☐ Hazard insurance quote
- ☐ Flood insurance documentation (if required)

If Applicable

- ☐ Divorce decree
- ☐ Child support or alimony documentation



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