



# LowerMyBills

## Mortgage Document Checklist

Purchase Documents	
Completed mortgage application	<input type="checkbox"/>
Signed purchase agreement	<input type="checkbox"/>
Identity Documents	
Driver's license or passport	<input type="checkbox"/>
Social Security card	<input type="checkbox"/>
Immigration documents	<input type="checkbox"/>
Income Documents	
Recent pay stubs	<input type="checkbox"/>
Recent income tax returns	<input type="checkbox"/>
<i>W-2 forms</i>	<input type="checkbox"/>
<i>1099 forms</i>	<input type="checkbox"/>
Checking account statements	<input type="checkbox"/>
Self-employment income	<input type="checkbox"/>
<i>Profit and loss statements</i>	<input type="checkbox"/>
<i>Itemized receivables</i>	<input type="checkbox"/>
Rental income	<input type="checkbox"/>
<i>Copy of lease</i>	<input type="checkbox"/>
<i>Property appraisal report</i>	<input type="checkbox"/>
Alimony or child support income	<input type="checkbox"/>
<i>Written agreement</i>	<input type="checkbox"/>
<i>Court order</i>	<input type="checkbox"/>
<i>History of payments</i>	<input type="checkbox"/>
Miscellaneous income	<input type="checkbox"/>
<i>Disability benefits</i>	<input type="checkbox"/>
<i>Foreign income</i>	<input type="checkbox"/>
<i>Interest</i>	<input type="checkbox"/>
<i>Capital gains</i>	<input type="checkbox"/>
<i>Pensions</i>	<input type="checkbox"/>
<i>Royalties</i>	<input type="checkbox"/>
<i>Social Security</i>	<input type="checkbox"/>



# LowerMyBills

## Mortgage Document Checklist

Debts and Expenses	
Student loans	<input type="checkbox"/>
Auto loans	<input type="checkbox"/>
Credit cards	<input type="checkbox"/>
Personal loans	<input type="checkbox"/>
Medical debts	<input type="checkbox"/>
Alimony or child support payments	<input type="checkbox"/>
Rental payment history and references	<input type="checkbox"/>
Assets	
Retirement savings	<input type="checkbox"/>
<i>401(k) statements</i>	<input type="checkbox"/>
<i>Individual retirement account statements</i>	<input type="checkbox"/>
Savings account statements	<input type="checkbox"/>
Investment statements	<input type="checkbox"/>
<i>Stocks, bonds, and mutual funds</i>	<input type="checkbox"/>
<i>Certificates of deposit</i>	<input type="checkbox"/>
<i>Miscellaneous investments</i>	<input type="checkbox"/>
Gift letters	<input type="checkbox"/>
Other properties you own	<input type="checkbox"/>
<i>Mortgage information</i>	<input type="checkbox"/>
<i>Appraisal</i>	<input type="checkbox"/>
Other documents	
Bankruptcy, foreclosure, or other relevant legal records	<input type="checkbox"/>
Alternative data for a thin credit file	<input type="checkbox"/>
Veterans Affairs certificate of eligibility	<input type="checkbox"/>