

Mortgage Document Checklist

Date: [Insert Date]

To: [Insert Lender's Name]

From: [Insert Your Name]

Subject: Document Checklist for Mortgage Application

Dear [Lender's Name],

As part of my mortgage application process, I have compiled the following checklist of documents required to secure the mortgage:

Personal Documents

- Government-issued ID (e.g., passport, driver's license)
- Social Security Number
- Proof of residency (e.g., utility bill)

Income Verification

- Two years of W-2 forms
- Recent pay stubs (last two months)
- Tax returns (last two years)
- Proof of additional income (if applicable)

Asset Information

- Bank statements (last two months)
- Investment account statements (last two months)
- Documentation for large deposits

Property Information

- Purchase agreement
- Property listing (if applicable)
- Homeowner's insurance quote

Debt Information

- Current mortgage statement (if refinancing)
- Statements for all existing loans and credit cards

Please let me know if any additional documents are required. I look forward to your swift response.

Thank you,

[Your Name]

[Your Phone Number]

[Your Email Address]