Mortgage Checklist

Learn what information is usually required during the loan process.

**The following information is usually required during the loan approval process:**

* Your Social Security number
* Photo ID
* Current pay stubs or, if self-employed, your tax returns for the past two years (if applicable)
* Bank statements for the past two months
* Investment account statements for the past two months
* Retirement account statements for the past two months

**If you currently own real estate:**

* Mortgage account information
* Home insurance policy information
* Home equity account information (if applicable)

**Additional documentation will not be requested/required until the Loan Estimate has been considered delivered per T.R.I.D. (1026.19(e)(2)(III)**