



HOME LOAN CHECKLIST

Let's Get Started

- Complete online application @ <https://www.bankforward.com/bank/personal/mortgage-center>
- Copy of driver's license
- Copy of most recent pay stubs for last 30 days
- 2 years of federal tax returns and W2s
- Last 2 months of non-Bank Forward checking and savings account statements; all pages

Along the Way

- Homeowners insurance policy and/or flood insurance policy
- Refinance:** Copy of most recent mortgage statement showing escrow information
- Purchase:** Signed Copy of purchase agreement with copy of cleared earnest money check
- Construction loan:** Blueprints, plans and specs, contractor information

As Needed

- Award letters such as social security, unemployment compensation or disability award letter
- Most recent copies of 401k, pension or other investment account statements; all pages
- Bankruptcy documents, tax liens or other derogatory items; all pages
- Self-employed - Corporate or partnership tax returns and K-1s for last two (2) years & Current YTD profit and loss statement
- Divorce decree, (final), or child support decree; all pages
- Official student transcript if attended school in the past 2 years
- Sale of current home—copy of the purchase agreement on sale of your present home and copy of settlement statement, if closed
- VA Loans: Form DD214

