

# Required Documents for Your Planning Session

Deciding the right mortgage for your personal financial situation requires your help.

Use this form as a checklist and bring the documents listed below to your planning session with Mike Vrba:

- Consecutive paycheck stubs covering the last 30 days (five if paid weekly, three if paid every two weeks, two if paid twice a month, one if paid monthly).
- W2 forms and complete copies of 1040 personal Federal Income Tax Returns with all schedules for the last two years.
- If you own a business: Copies of corporate, partnership or S-Corporation Federal Income Tax Returns with all schedules and K-1s for the last two years.
- Complete bank statements (all pages) for the last three months for all checking, savings, CD, money market, stocks, bonds, IRAs, 401Ks or other bank and investment accounts.
- Sales contract and/or listing MLS data sheet on house you are purchasing.
- If applicable: Names, addresses and telephone numbers of your landlords for each residence you rented over the last two years.
- If applicable: Complete copies of divorce decrees and associated amendments to support alimony and child support payments.
- If applicable: Complete bankruptcy papers, including filings, discharge papers and list of creditors.
- For recent graduates (in last two years): Copies of transcripts or diploma showing the date of graduation.
- VA buyers: DD-214 and Certificate of Eligibility

## If you own a home(s) currently, also include:

- Most recent mortgage statement for all current, open mortgages.
- Mortgage & Note from closing for all current, open mortgages.
- Current homeowner's insurance declarations page, including insurance agent's name and phone number.
- Most recent real estate tax bill.

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