

# Home loan documentation checklist

Use this handy checklist to gather the documents for your home loan.

Once complete, please return to:

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Please provide  
Enclosed

## Documentation checklist

| Income information:      |  |
|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> 60 days' pay stubs with year-to-date information for all jobs and for each borrower   |
| <input type="checkbox"/> | <input type="checkbox"/> Federal tax returns for the years (1040's) _____  |
| <input type="checkbox"/> | <input type="checkbox"/> W-2s for the years _____  |
| <input type="checkbox"/> | <input type="checkbox"/> Written explanation if employed less than two years or gap in employment in last two years  |
| Credit information:      |  |
| <input type="checkbox"/> | <input type="checkbox"/> Most recent two months asset statements listed on the application – all pages<br>(Example: checking account, savings account, CDs, money market accounts, IRA, 401k, etc.)  |
| <input type="checkbox"/> | <input type="checkbox"/> If applicable, landlord name _____ Phone number (____) _____<br>Address _____   |
| <input type="checkbox"/> | <input type="checkbox"/> If you have any obligations due to legal action, for example child support, lawsuit judgment, bring in any judicial decree  |
| <input type="checkbox"/> | <input type="checkbox"/> If applicable, complete Bankruptcy papers including discharge papers – also provide documentation supporting circumstances leading up to the bankruptcy, if able  |
| <input type="checkbox"/> | <input type="checkbox"/> If applicable, credit explanation letter for any late payments, collections, judgments or other derogatory credit items   |
| <input type="checkbox"/> | <input type="checkbox"/> Documentation for any large deposits outside payroll or gift fund deposits shown on asset statements  |
| <input type="checkbox"/> | <input type="checkbox"/> Payments for utilities, rent and car<br>Public utilities _____ Phone number (____) _____<br>Phone company _____ Phone number (____) _____<br>Cable _____ Phone number (____) _____<br>Car insurance _____ Phone number (____) _____ |
| Other Information:       |  |
| <input type="checkbox"/> | <input type="checkbox"/> Copy of Driver's License  |
| <input type="checkbox"/> | <input type="checkbox"/> Copy of Social Security Card  |
| <input type="checkbox"/> | <input type="checkbox"/> Homeowner's Insurance information:<br>Agent name _____ Phone number (____) _____  |
| <input type="checkbox"/> | <input type="checkbox"/> Other _____   |
| <input type="checkbox"/> | <input type="checkbox"/> Other _____   |
| <input type="checkbox"/> | <input type="checkbox"/> Other _____   |
| Special Information:     |  |
| <input type="checkbox"/> | <input type="checkbox"/> Last 3 years' complete Federal tax returns (both personal and business returns)   |
| <input type="checkbox"/> | <input type="checkbox"/> Year-to-date profit and loss statement  |
| <input type="checkbox"/> | <input type="checkbox"/> List of all business debts  |



Credit is subject to approval. Some restrictions apply.

This information is accurate as of date of printing and is subject to change without notice.

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