

Documentation Checklist



Required

- Copy of driver's license
- 2 most recent paystubs
- All 2019 and 2018 W2's (and/or 1099's)
- 2019 and 2018 Federal tax returns including all schedules (all pages)
- 2 most recent official checking and savings account statements (all pages)
- 2 most recent retirement account statements (all pages)
- Contact information for homeowners insurance agent

If Applicable

- Copy of earnest money check once it's cleared (purchases only)
- Copy of your settlement statement from when you purchased the property (refinances only)
- Most recent mortgage statement (refinances or other property owned)
- Copy of current mortgage notes
- Full divorce decree & child support orders
- 2019, 2018, 2017 Business tax returns including all schedules
- Most recent social security/pension income awards letter
- First time homebuyer class (MSHDA, and 3% down Conventional Loans)
- College transcripts (unofficial ok, only within last 2 years)
- Bankruptcy papers (only within last 7 years)

The KP Team

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