

Document Checklist (Short)

The following is a list of information, items or documentation you may need when meeting your Mortgage Broker to submit a loan application.

Key Mortgage Brokers Short Checklist

- Social Security Number(s)
- Driver's License or passport/work visa/green card
- Pay Stubs for the last 30 days
- Last 2 years W-2's
- Bank and asset statements for last 2 months (all pages)

If self-employed:

- Last 2 years of personal and corporate tax returns
- Current year profit and loss statement

For Purchases:

- Executed copy of purchase contract.
- Proof of escrow deposit (monies taken at contract) cashed and cleared account.
- Proof of down payment and closing costs in personal account for minimum of 60 days.
- Hazard/Flood/Wind Insurance policy covering home for upcoming year.
- Condo association information (name, phone number etc.)

For Refinance:

- Warranty deed
- Pay-off statement (of current mortgage)
- Prepayments.
- Owners title policy
- Survey
- Hazard/Flood/Wind Insurance policy
- Condo association information (name, phone number etc.)

If you're not sure about the document requirements, feel free to give us a call at 239.791.5555 and ask to speak to one of our Mortgage Specialists



Remember to ask about...

Our 100% Financing

30-40-50 Year Loans

No Income Loans

Second Mortgages

Jumbo Loans

First Time Buyer Programs

2 Locations To Serve You...

Fort Myers

239.791.5555

877.791.KEYS

Sanibel Island

239.935.1011

800.367.2011

Key Mortgage Brokers

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