



# MORTGAGE CHECKLIST TO KEEP YOU ON TRACK

### The Following Information Is Usually Required During the Loan Process

- Your social security number
- Your tax returns for the past two years
- Bank statements for the past two months
- Investment account statements for the past two months
- Life insurance policy
- Retirement account statements for the past two months
- Make and model of vehicles you own and their resale value
- Auto loan account information
- Personal loan account information
- Divorce decree (if applicable)
- Prior bankruptcy documentation (if applicable)

### If You Currently Own Real Estate

- Your most recent mortgage statement
- Home insurance policy information
- Home equity account note (if you are refinancing)
- Copy of your current note (if you are refinancing)

### Home Buying Checklist

- Find a Realtor®
- Find an Experienced TLC Loan Officer (LO)
- Receive a Pre-Approval Letter from TLC
- Work with Realtor® to identify desired property and get offer accepted
- Send LO Copy of Purchase Contract
- Send LO Copies of Your Canceled Earnest Money Deposit Checks
- Work with Realtor® to complete any necessary due diligence (e.g., home inspection, termite inspection, etc.)
- Schedule an Appraisal through TLC
- Conduct a Final Walk-through before consummation
- The purchase contract
- Copy of your canceled earnest money deposit check



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