



Document Checklist

In general, this is the documentation you will need for your loan.

Additional documents may be required depending on your particular situation.

Property Information (if you already have a Purchase Contract on a house):

- Purchase Agreement
- If you are selling your current home, copy of Sales Agreement
- If you have sold your current home, copy of fully executed Closing Disclosure (CD)

Refinance:

- Valid Homeowner's Insurance Policy Declarations Page
- Valid Property Survey
- Current HOA bill (if applicable)
- Current Mortgage Statement(s) to order Payoff Statement(s)

Income & Assets:

- Pay Stubs for the last thirty (30) days
- Tax Returns for the last two (2) years with all schedules
- W-2's for the last two (2) years
- Complete statements for bank, brokerage and retirement account for the last two (2) months
- If Self Employed or working as a Contractor, additional documentation may be requested

If you are Retired and/or receiving Social Security Income:

- Pension Award Letter
- Social Security Award Letter
- Other applicable retirement income needed to qualify (annuities, 401k distributions, etc)

If you Pay or Receive Child Support as income:

- Copy of Divorce Decree

Borrower Identification:

- Valid Photo ID/Driver's License
 - If you are not a US Citizen, a copy of the front and back of your Green Card or Work Visa
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848 Dominion Drive, Ste., 200-A, Katy, TX 77450

Phone: 281-377-5201 Fax: 888-377-8486

www.txpromortgage.com