

Your Document Checklist

- Paycheck stubs** for the last 30 days showing year-to-date earnings
- Two years **most recent Federal W-2's** issued by your employer
- Most recent **two months of bank statements**. This includes checking, savings, retirement, stocks, investments, etc. Be sure to include entire statement, including blank pages. *If all of your accounts are with Heritage, we can access those for you.*
- Quote for **homeowners insurance**
- List of any **new debts** not listed on your credit report (if applicable)
- Current **mortgage statement** if you currently have a mortgage with another financial institution
- Homeowners declarations** for all current properties owned
- Social security awards letter** and/or retirement/pension benefit statement



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