



SUMMIT BANK

Mortgage Loan Checklist

- ___ Complete real estate application
- ___ One full month pay stubs on all borrowers
- ___ One month bank statements on all accounts with all pages
- ___ One month statements on brokerage or retirement accounts with all pages
- ___ Two years W-2's
- ___ Sales Contract (for purchases)
- ___ Copy of Warranty Deed (for refinances)
- ___ Homeowner's Insurance information (agent name and phone number) and annual premium
- ___ Copy of valid driver's license for all borrowers

If you are self-employed or receive commission income, the following items will also be required:

- ___ Two years signed personal tax returns (all pages)
- ___ Two years signed business tax returns (all pages)
- ___ Most recent P&L statements for businesses

Additional information may be required, depending on the type of loan.

****Please call Tresh Swickey @ (918) 519-5517 or (405) 285-8268 if you have any questions.****