



INTERLINK
Home Mortgage Specialists
 2800 Royal Avenue, Madison, WI 53713
 (608) 223-2771 - (608) 223-0668 fax

Loan Application Checklist

This checklist is a general guide prepared to assist you in gathering information required to complete the loan application process. You can expedite the process by collecting as much of the needed information as you can before your appointment.

DO I HAVE?

N/A YES NO DUE DATE

PROPERTY INFORMATION

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Purchase Agreement, includes legal description and purchase price
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	If refinancing your home, prior Title Insurance

PERSONAL INFORMATION

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Home address(es) for the last two years including landlord's name & address
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Divorce Decree and/or separation agreement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Bankruptcy Discharge Papers with explanation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Gift letter or explanation of source of funds for closing costs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	If VA loan, Original Certificate of Eligibility and DD214

INCOME

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Recent pay stubs (for one month)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Documentation on any supplemental income: bonuses, commissions, etc.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Names, addresses phone and/or fax numbers of all employers for the last 2 years
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	W-2's for the last 2 years
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	If self-employed or commission sales, copies of last two years federal tax returns with all schedules and year-to-date profit & loss statement for the current year signed by accountant; explanation of any other income
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Payment history (12 months) for maintenance/child support

REAL ESTATE OWNED

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Names, address and account number of mortgage lender for past two years
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Copies of leases and two years tax returns for any rental property
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	If refinance, market value estimate; ex: old appraisal/tax assessment

LIQUID ASSETS

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Complete names, addresses, phone numbers and account numbers for all bank accounts, (credit union, 401K, IRA's, investment accounts, etc)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Copies of two (2) months most recent statements for all bank accounts
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Copies of recent mutual funds/brokerage statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Value of other assets, (auto, household goods and collectibles)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Cash value of life insurance policies, (most recent statement)

LIABILITIES

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Current and original credit card statements from the credit card company
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Proof of recent debts paid in full
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Proof of deferred payment on student loans; provide all documentation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Proved all documentation on loan to be paid off before closing; including proof of source of funds (please ask your loan officer for details)

OTHER INFORMATION

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	A detailed letter of explanation for any late payments, judgments, liens, bankruptcy or foreclosure
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	Closing statement for sale of current property
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	If VA loan, copy of social security card and driver's license
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	If non-resident, copy of Certificate of Resident Alien Status (Green Card)