

# Applying for a Mortgage Checklist



Thanks for your interest in getting a mortgage with Union Square Mortgage.  
Here are a list of items that we will need to get started.

## From All Borrowers:

- \_\_\_\_\_ A valid driver's license or other government-issued photo identification, date of birth and Social Security number
- \_\_\_\_\_ Most recent statements (the last two months) for all checking, savings, stock, mutual funds, IRAs or other liquid asset accounts.
- \_\_\_\_\_ Loan information, including balance, monthly payment and any rents collected for other real estate owned, if applicable
- \_\_\_\_\_ Up-to-date addresses for the past two years

## For Purchase Loans:

- \_\_\_\_\_ Copy of sales contract
- \_\_\_\_\_ Contact information of your insurance agent

## For Refinance Loans:

- \_\_\_\_\_ Survey of your property
- \_\_\_\_\_ Copy of current mortgage statement
- \_\_\_\_\_ Copy of current mortgage note
- \_\_\_\_\_ Copy of current homeowners insurance declarations page
- \_\_\_\_\_ Deed of trust
- \_\_\_\_\_ Settlement statement from the time of purchase



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