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Mortgage Document Checklist – Veterans

For all borrowers on the loan, please provide the following where applicable:

- **2 Forms of Identification-** Copy of each borrower's driver's license and one other form of ID
- **Paystubs** -most recent **30 days** (should include your name, company name, and YTD info)
- **W-2's- 2017/2018**
- **Personal Tax Returns (Federal)** – Signed and complete with all schedules (**2017/2018**)
- **Social Security Award Letter**, if applicable
- **Pension Income Statement**, if applicable
- **Bank Statements** for each deposit account (most current **2 months**- complete statements)
- **Homeowner Insurance Declaration Page**, if a refinance transaction
- **Insurance Agents Information**, if a purchase transaction (Include name and phone number)
- **Tax Receipts / Escrow Analysis Statement** (most recent year – city, school and local), if a refinance transaction
- **Sales Agreement**, if purchase transaction (must be signed by all parties)
- **Retirement/401(k) Statements** (most recent two months or quarters- complete statement)
- **Divorce Decree or Separation Agreement**, if applicable (complete decree/sep agreement-fully executed)
- **Child Support** (Proof of payments or verification if income)
- **Credit Card Statements**, if applicable (for all accounts to be paid off in refinance)
- **Oil & Gas lease** for property- if applicable (even if seller is retaining the rights)

Veteran-specific Documentation:

- **Certificate of Eligibility-** COE verifies to the lender that the individual are eligible for a VA-backed loan.
- **Amount Paid Monthly in Childcare-**
- **Closest Living Relative's Information-**

If Self-Employed, please provide all items above and the additional items listed below:

- **Personal Tax Returns** – Signed and complete with all schedules (**2016/2017** if; self-employed, rental income, royalty income, family owned business, copy of rental leases)
- **Profit and Loss Statement, YTD 2018** (must be signed and dated; can be hand written or computer generated)
- **Partnership Returns-** Signed and complete with all schedules (**2016/2017** and must include K-1 and support information in Personal Return)
- **Corporate Returns-** Signed and complete with all schedules (**2016/2017** and must support information in Personal Return)

Other documents may be requested during the processing of your pre-approval application.

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