

# LOAN APPLICATION CHECKLIST



People you know. A name you trust.

Here is a list of what we need in addition to your completed loan application:

**For all applications:**

- 30 days recent pay stubs for all borrowers on the application
- 2 months recent bank or credit union account statements for funds being used for closing costs or down payment
- If using income from other sources, such as Social Security, disability, or retirement, please provide Award Letters or statements from those accounts showing amounts paid or distributed monthly

**If you're purchasing a property:**

- Most recent 3 years complete tax returns for all borrowers on the application, with all schedules if applicable
- Most recent 3 years W-2s and/or 1099s for all borrowers on the application

**If you're refinancing a property:**

- Most recent 2 years complete tax returns for all borrowers on the application, with all schedules if applicable
- Most recent 2 years W2s and/or 1099s for all borrowers on the application
- Current mortgage statement
- Homeowner's insurance declaration page, something showing your annual premium and due date, and your agent's contact information

**If using military benefits, provide a copy of your DD214 or statement of service; Certificate of Eligibility if possible.**

**If self employed, provide your corporate tax returns if applicable.**

**If you pay child support or alimony, provide copies of your divorce decree and/or child support agreement.**

**If property is in a trust, provide a complete copy of the trust.**

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