

Document Checklist

These are documents that homeowners need to bring to an outreach event. The appropriate paperwork and documentation will make the process flow easier and results faster. Information about the monthly gross (before tax) income and expenses for all the borrowers who signed your mortgage (for example spouse) is needed.

- **Most recent tax return with all the schedules and W-2s**
- **Two most recent bank statements**
- **Two most recent pay stubs (if you receive them) or documentation of your income you receive from other sources (e.g. alimony or child support)**
- **Monthly mortgage statement showing the mortgage servicer information and the mortgage loan account number**
- **Information about other mortgages on your home, if applicable**
- **Account balances and minimum monthly payments due on all your credit cards**
- **Account balances and monthly payments on your other debts (such as student loans and car loans)**
- **Estimates of monthly expenditures (such as utility bills, food expenses, insurance payments, medical bills)**