



Homebuyer Document Checklist

Required Forms:

- ☐ Program Application
- ☐ Family Composition
- ☐ Declaration of 214 Status
- ☐ Income and Asset Checklist (one for each household member 18 and older)
- ☐ Client Questionnaire
- ☐ IRS 4506-T Document
- ☐ Complaint Procedure Acknowledgement
- ☐ Fair Housing/Lead Paint Brochure Acknowledgement
- ☐ Authorization to Release Information

Documents to Provide:

- ☐ Pre-approval letter from lender for first mortgage
- ☐ Copy of Personal Identification for each household member
- ☐ Copy of Social Security Card for each household member
- ☐ Three (3) months of current pay check statements (Income Statements)
- ☐ Copy of the last Federal Tax Forms submitted to the IRS, including W-2s (2 years if self-employed)
- ☐ Copy of the last State Tax Forms submitted to the IRS, including W-2s (2 years if self-employed)
- ☐ Copy of last 6 months bank statements – checking and/or savings
- ☐ Copy of last 3 months of statements for all liquid assets (ie. stocks/bonds)
- ☐ Certificate of Homebuyer Counseling Completion from a HUD approved counseling agency

Homebuyer: _____

Phone: _____ **Email:** _____

Address of New Home: _____

Realtor: _____ **Phone:** _____

Lender: _____ **Phone:** _____

Contact: _____