

# ANSON BANK & TRUST

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## Mortgage Application Checklist

### Information needed for application:

#### ❖ Personal Information

- Name, current address, phone number , social security number (s)

#### ❖ Employment

- W2 forms for the past 2 years and most recent YTD pay stub
- If self employed, last 2 years' personal and corporate tax returns, YTD P&L, and balance sheet

#### ❖ Property Specifics

- Subject property address

#### ❖ Present Housing Expenses

- Monthly rent (with landlord name, address and account number) for the past 2 years  
Or
- Monthly mortgage payment (including taxes and insurance) with mortgagee name, address and account number

#### ❖ Assets

- Last 2 monthly checking/savings account statements (unless Anson Bank & Trust customer) or bank name, address, account number and balance information for each deposit accounts
- Last 2 monthly Brokerage statement (s)

#### ❖ Liabilities

- List of all debts including name of all creditors, monthly payments and balance owed

#### ❖ Real Estate Owned Specifics

- Address, value, rent income, mortgage payment, annual property taxes and fees for your real estate property

**Additional documentation may be required depending on specific situation.**

**Loan-to-Value must equal 80% or less.**

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**704-694-2122**

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