



MORTGAGE WEEKLY DOCUMENTATION CHECKLIST

THINGS TO DO AFTER MORTGAGE APPLICATION IS FILED

- Continuously supply current paystubs
(Turn in documents every Friday or as received)

- Continuously supply bank statements from ALL accounts.
(Turn in documents every month as received)

- Supply statements from investment accounts:
(Turn in documents every month as received)
 - Annuity
 - Mutual Funds
 - Money Market/CDs
 - IRA's, 401K/403B
 - Stocks

- Suspend all credit card usage, unless prior approval from financial officer
 - Immediately notify of charges & any utilization changes.
 - Notify if card needs to be used for emergent purposes.

- Do not personally open, co-sign on any new accounts, or allow credit report to be run without consultation with financial officer.

Not following the checklist, will jeopardize the approval of the loan and cause closure of the file.