

Meeting Your Servicer - Document Checklist

- ◆ Most recent tax return with all the schedules and W-2s
- ◆ Two most recent bank statements
- ◆ Two most recent pay stubs or documentation of income you receive from other sources
- ◆ Copy of any benefits statements, reflecting amount, frequency & duration
- ◆ 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 & minimum monthly payments due on all your credit cards
- ◆ Account balances & monthly payments on your other debts
- ◆ Estimates of monthly expenditures
- ◆ Hardship letter
- ◆ Recent utility bill showing property address
- ◆ Most recent profit & loss statement if self-employed
- ◆ Copy of closing documents and most recent correspondence from mortgage company