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What to Bring to Your First Meeting

This is a quick check of the income and asset verification documents you'll need for pre-approval. You don't have to have everything on this list (few buyers do), and if you don't have all this information immediately available, just bring what you have, and the rest can be assembled later.

Document	✓
INCOME	
Your last two years' tax returns (complete with all schedules)	☐
Your last two years of W-2 forms	☐
Your most recent pay stub	☐
If you're planning to buy with a spouse or partner who files separate tax returns, bring the last two years of those returns, W-2 forms and recent pay stub	☐
ASSETS	
Your checking account statement	☐
Your savings account statement	☐
Your 401(k) and/or IRA statements	☐
All other bank account statements	☐
All other investment and/or retirement account statements	☐
Information on each property you own: type of loan, terms, amount owed and estimated current value	☐
If you're planning to buy with a spouse or partner who owns their own properties, information on those properties: type of loan, terms, amount owed and estimated current values	☐