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## Refinance Checklist

Please send the following items as these are generally needed for refinancing existing mortgage loans. Then relax, because we've got you covered.

- Copy of Last 2 years W-2's.
- Copy of Last 2 years Federal Tax Returns with all schedules
- Copy of most recent 30 days paystubs
- If you are receiving retirement income, provide recent 2 years 1099-R forms and 3 months of bank statements if directly deposited.
- Copy of your most recent mortgage statement for all existing liens, for all properties you own
- Copy of your Mortgage Note for both 1<sup>st</sup> and 2<sup>nd</sup> from when you purchased or last refinanced. Normally this document is found in your closing package if you have saved it. NOTE should be written on very top middle of this document. If you can't find it, bring the whole package at the meeting. We can look for that.
- Copy of driver license and social security card
- Copy of homeowner's (Hazard) Insurance declaration page for all properties you own
- Copy of recent 1 months bank statement
- Appraisal Fee if required

Please don't hesitate to call or email if you have any questions. I look forward to fulfilling your home refinancing needs!