

Mortgage Refinance Checklist

Income	Borrower	Co-Borrower(s)
Last 30 days of paystubs	<input type="checkbox"/>	<input type="checkbox"/>
Last 2 years W2's or 1099's	<input type="checkbox"/>	<input type="checkbox"/>
Last 2 years signed tax returns <i>(all pages)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Self Employed Borrowers:		
Last 2 years business tax returns all schedules	<input type="checkbox"/>	<input type="checkbox"/>
<i>When applicable:</i>		
Verification of child support and/or alimony income <i>(if listed as income)</i> <i>*Child Support order and/or divorce decree</i>	<input type="checkbox"/>	<input type="checkbox"/>
Assets		
Last 2 months bank statements	<input type="checkbox"/>	<input type="checkbox"/>
Last 2 months 401k retirement statements <i>(if quarterly, need last 2 quarters)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Residence Information		
Current Mortgage statement <i>(1st & 2nd, if applicable)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Current Homeowners insurance policy <i>(all pages)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Current real estate tax bill <i>(if real estate taxes are not paid by mortgage company)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Identification		
Unexpired driver's license or state issued photo ID	<input type="checkbox"/>	<input type="checkbox"/>
Divorce/Separation <i>(if applicable)</i>		
Copy of separation agreement, divorce decree, and/or property settlement agreement	<input type="checkbox"/>	<input type="checkbox"/>
Other/Miscellaneous:		