



Refinance Loan

Document List

W2 Borrowers

- Copy of driver's licenses for all applicants
- Copies of social security cards for all applicants
- Paycheck Stubs – last full 30 days for all applicants
- W2 forms – recent 2 years for all applicants
- Bank Statements – recent 2 months for all applicants (all pages, even if blank)
- Current Mortgage Statement
- Current Homeowner's Insurance Statement with agent's name and phone number

For self-employed borrowers please provide the above and:

- Personal Income Tax Returns for the past two years
- Business Income Tax Returns for the past two years, include all pages and K1 statements