

REFINANCE APPLICATION CHECKLIST

Use our checklist to help you organize your information before you get started.

Check off each item that you've completed.

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| <input type="checkbox"/> Current mortgage information including copy of mortgage statement | <input type="checkbox"/> Copies of tax returns and W-2s for the past two years |
| <input type="checkbox"/> Your homeowners insurance policy and billing information | <input type="checkbox"/> Copy of divorce decree or separation agreement, if applicable |
| <input type="checkbox"/> Your property tax bill | <input type="checkbox"/> Copy of year-to-date profit and loss statement, if self-employed |
| <input type="checkbox"/> Social Security Numbers for yourself and any co-borrowers | <input type="checkbox"/> Letter explaining any discrepancies or disputes with credit history |
| <input type="checkbox"/> A list of all your recurring monthly expenses (car payments, credit cards, etc.) | <input type="checkbox"/> Copies of complete most-recent bank statements for savings, checking, and retirement accounts |
| <input type="checkbox"/> A list of your employers and their contact information for the past two years | <input type="checkbox"/> Copies of paystubs and other sources of income for yourself and any co-borrowers (child support, alimony, home-based employment). |
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