

REFINANCE MORTGAGE LOAN CHECKLIST

Checklist for Borrowers

- _____ Intake Form Complete
- _____ Driver's License
- _____ Social Security Card
- _____ Pay Stubs (1 month)
- _____ Tax Returns (most recent 2 years)
 - ___ All schedules with w-2's and 1099's (most recent 2 years)
 - ___ Profit and Loss statement (self employed)
- _____ Bank Statements (2 most current months)
- _____ Current Mortgage Statement
- _____ If in Forbearance (forbearance documentation)
- _____ Copy of Homeowner Insurance
- _____ Copy of Property Tax bill

IF APPLICABLE:

- _____ Current Social Security Income Award's Letter
- _____ Pension Documentation
- _____ Divorce Decree
- _____ Child support order & statement showing received
- _____ Alimony Order & statement showing received