



Standard Items for Loan Application - Refinance

The below is required from each loan applicant. You can print this page and use it as a checklist for gathering your documents.

- Last 30 days of paystubs
- W2 / 1099 forms for last 2 years
- Tax Returns forms for last 2 years
- Most recent 2 months of bank statements (all pages of each statement are needed – even if blank)

- Driver's License
- Social Security Card
- Resident Alien Card or Work Permit, if applicable
- Authorization forms - signed

- Mortgage Statement(s)
- Fire / Hazard Insurance policy
- Property tax bill

These documents can be emailed, faxed, or uploaded via a secured link.

If you have any questions, please don't hesitate to call our office.

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