

MORTGAGE REFINANCE DOCUMENT CHECKLIST

You may be asked to provide the information below when you apply for a home refinancing loan, or during some part of the loan application process.

- ☐ Full legal name, Social Security number and birthdate for all applicants
- ☐ Phone number, eMail address and current and former residential mailing addresses over the last two years
- ☐ Government-issued photo ID
- ☐ Current monthly mortgage statement
- ☐ Primary and secondary income amounts and sources
- ☐ Name, addresses, and phone numbers of all employers over the last two years
- ☐ Federal tax returns (personal and business)
- ☐ IRS Form 4506-T – Request for tax transcript, completed, signed and dated
- ☐ Pay stubs covering the last 30 days
- ☐ W-2s for the past two years
- ☐ Asset/bank statements – Most recent two months' statements for all accounts listed on the application
- ☐ Homeowners insurance information, including agent's name and phone number

*This is not a comprehensive list, your mortgage company may require other documents or not all of these.

