

Documents Needed for Refinance

To prepare your mortgage refinance, please gather the following documents for our team to review:

- 30 days of current pay stubs with a year-to-date total
- Previous 2 years' W-2s
- Two months of bank statements
- Home owners insurance information (declaration page)
- Recent mortgage statement(s)

If applicable:

- Copies of divorce papers
- Child support documentation
- If self-employed, two years of business tax returns and current profit and loss statement
- Current statement for investment accounts, ALL pages (401K, IRA, etc.)
- Copies of most recent award letters (if retired)
- Previous 2 years' Federal tax returns (if you collect rental income)

Mortgage Experts



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