



Refinance Loan Application Checklist

For refinance loan application, please email, fax or upload following documents to your loan officer:

- Completed and signed loan application
- Signed Borrower's Certification and Authorization form
- Copy of passport (photo page) or driver license (front & back) if you are a US citizen
- Copy of green card (front & back) if you are a US permanent resident
- Copy of foreign passport, US visa and I-94 form if you are foreigner or non-permanent resident
- Copy of recent pay stubs covering last 30 days pay period
- Copy of last 2 years W2s and 1099 forms
- Copy of last 2 years federal personal tax returns (form 1040 with all schedules)
- Copy of last 2 years business tax returns and K-1s if you have 25% or more ownership interest in any companies
- Copy of recent 2 month or recent quarterly bank statements including checking, savings, 401K and any investment accounts – all pages
- Recent mortgage statement if there are any mortgages under your name or against subject property
- Copy of current home insurance declaration if you own any existing properties
- Copy of current lease agreement if you own any rental properties
- Copy of recent maintenance or common charge bill (HOA bill) if the property you own has HOA
- Any other supporting documents: _____

Your name: _____

Your email: _____

Cell Phone: _____

Our loan officer you know: _____