



Documents Needed for Refinance

- Copy of pay stubs or any other monthly income documents (all borrowers)
- W2's from 2016 & 2017 (if applicable)
- 2016 & 2017 Tax Returns, all pages & schedules
- Copy of 1099 income statements for 2016 & 2017 (if applicable)
- Copy of any asset statements (IRA, 401, TSP, Money Market)
- Copy of last two months Checking and Savings Account Statements (all pages)
- Copy of Survey on Home
- Copy of Settlement statement when you purchased or last refinanced property
- Copy of Deed of Trust & Note on property
- Current Mortgage payment coupon
- Copy of current Homeowners Insurance coverage
- Copy of Drivers License (all borrowers)
- Copy of Social Security cards (all borrowers)

If you have any questions please let us know. We look forward to working with you!

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or Fax to:

(210) 625-3478

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