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REFINANCE
INITIAL Needs List

(Please note that further documentation may be needed.)

Voluntary Checklist

You may voluntarily provide the documents below; these documents may be required for underwriter purposes. Please know you are volunteering this information, these documents are not required until you have entered into loan application and have received and reviewed your initial loan estimate, and you have provided intent to proceed with your loan application.

CHECK OFF	DOCUMENT (Provide only those that apply to you.)
	Two (2) Months most recent Pay Stubs
	2018, 2017 W-2s
	2018, 2017 Full Tax Returns Personal and Business including <u>All Schedules</u>
	2018, 2017 1099s for Social Security and 2018 Awards Letter
	2018, 2017 1099s Pension and Benefits Letter indicating funds will continue for three (3) years.
	Two (2) Months most recent Bank Statements – All Pages 1-X
	(Items are located in your title closing package for your most recent mortgage.) NOTE MORTGAGE (or Deed of Trust) Improvement Location Map (Survey)
	Mortgage Statement
	Home Owner’s Insurance Declaration Page
	Copy of Driver’s License and Second ID – Social Security Card, Gov’t ID, etc.