



## Real Estate and Lending Solutions, Inc.

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### Mortgage Refinance Documentation Checklist

#### Personal

- Driver's license
- Social Security card / US Passport
- Divorce decree (if applicable)
- Proof of veteran or active duty status (for VA loan)

#### Employment/Income

- Federal income tax returns for the previous two years
- W-2 forms for the previous two years
- Pay stubs for the previous 30 days
- Proof of additional income, such as Social Security benefits, child support, or alimony (if applicable)
- Previous two years' and year-to-date profit and loss statements (if self-employed)
- Balance sheet for the most recent quarter (if self-employed)

#### Assets

- Most current Mortgage or Equity Line / Loan Statement of Property to Refinance
- Statements for checking and savings accounts for the last three months
- Statements for retirement funds and other investments for the last three months

#### Liabilities

- Run Credit once above documentation is reviewed.

*Note: Lenders can have different documentation requirements. AND additional documentation is likely, to be requested*