



13180 Metcalf Ave. • Overland Park, KS 66213 • Phone (913) 681-HOME • Fax (913) 814-7979

# REFINANCE CHECKLIST

**Please fax copies of the following information to 913.814.7979**

- Pay-stubs for the most recent FULL 30 DAY PERIOD (continue to keep)
- 2009 W-2     2010 W-2
- If commission and/or bonus income is to be used, one (1) most recent years' personal federal income tax returns, including all schedules, K-1's and 1099s.
- If self-employed (owns 25% or more of the business), one (1) most recent years' corporate tax returns (forms 1020, 1120 or 1065).
- Most recent ONE MONTHS' statements for checking/savings accounts.  
*On line bank statements are not acceptable unless they are signed and dated by a bank official.*
- Most recent statement for other asset accounts: 401(k) plan, IRA, Mutual Funds, stocks, etc.
- Name and Phone number of current home owner's insurance agent.
- Copy of coupon on mortgage loan (first and second mortgage if applicable)....something with taxes and insurance amounts broken out.
- Closing Date \_\_\_\_\_ Please call Jill at 681-4663 to set up a time.

**ADDITIONAL COMMENTS:**

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**It is imperative that you provide the needed information in a timely manner as it will help us to provide a quick closing on your refinance.**

**We thank you for your patience and understanding!**