

Refinance Documentation Checklist

- One month of most recent paystubs
- Two months of most recent bank statements and/or asset statements (401K/IRA)
- Driver's license and secondary form of ID
- W-2 forms from the past two years for each applicant
- Income tax returns from the last two years

If self-employed

- Federal tax returns and business returns for the last two years
- Current profit and loss statement
- Cash balance sheet



www.lusofederal.com

599 East Street, Ludlow
Phone: (413)589-9966 Fax: (413)583-4491

One Crane Park, Suite 4, Wilbraham
Phone: (413)279-3002 Fax: (413)279-1919

Loan Originator Company Identifier 255907



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