

MORTGAGE LOAN REFINANCE

To expedite your refinance transaction, the following items outlined below will be necessary to best assist with your financial needs.

- A copy of your current mortgage statement, showing current balance and escrows (if applicable)
- Current property tax statements, if not escrowed
- Declarations page from your homeowner's insurance policy
- Most recent pay stubs, covering a 30-day period
- All W2 forms for the last 2 years; and complete tax returns including all attachments (1099s, K-1s, etc.)
- Most recent bank statements, all pages
- Valid photo ID

****Other documentation may be required upon review****

Apply online by visiting tbacu.com/mortgages

Schedule a virtual meeting by visiting tbacu.com/schedule-an-appointment



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