



Refinancing a home? Here's what you'll need.

Please provide the following documentation for your refinance:

- ☐ Copy of the property's deed
- ☐ Copy of your current property **AND** school tax bill
- ☐ Copy of your current Homeowner's Insurance Declaration page (*Premium page*)
- ☐ Copy of your current mortgage statement
- ☐ Current paystub dated within 30 days **AND** last two years of W2s for each borrower
 - *For self employment and/or rental income: last two years of tax returns*
 - OR**
 - *Social Security Award Letter and Pension 1099S Form (if applicable)*
- ☐ Copy of any liquid asset(s) statements: 401k, IRAs, Stocks, etc.
All statements must include all pages and cover at least the most recent 30 days of activity
- ☐ Current statement copies for any items being paid off with this mortgage (*if applicable*)

Please submit all requested items via the online application portal at visionsfcu.ficslpo.com, or drop them off at your local branch and ask them to forward the paperwork to your interviewer. You may also contact your mortgage interviewer directly for submission instructions.

Once all documentation is received, your interviewer will be able to complete your mortgage application and will send all remaining documents to your email via DocuSign for secure, electronic signing, or you can schedule an alternative appointment by visiting visionsfcu.org/appointments.

800.242.2120

Federally
insured
by NCUA



YOUR MORTGAGE CONSULTANT IS:

NAME: _____ NMLS #: _____ EMAIL: _____ PHONE #: _____