

### **Refinance Checklist**

Based upon the type of refinance you are doing, some, or even most of the items on this checklist may not be necessary. Contact a Mortgage Loan Officer for more detailed information on what you may need to provide at time of application.

- Your current residence address, or addresses, for the past two years.
- Social security numbers for all borrowers.
- Your employment history for the past two years. You'll need your employer(s) name, address, and phone number.
- Income information for all borrowers. You'll be asked to include salary, overtime, bonuses, commissions, interest/dividend, retirement income, and any other regular source of income.
- The year you purchased the property being refinanced, its original cost, current loan balance, and payment amount.
- Bank and brokerage account information, including the institution name and current balances.
- If you own any real estate (other than property you're refinancing), we'll have some basic questions including: address, current market value, the amount you owe, the rental income you receive (if any), and what your monthly payment is.
- Information about your current debts. We'll ask for the name of the creditor, the account number, the current balance owing, and the amount of your monthly payment.

### **Notes:**

---

---

---

---

---

---

---

---

---

---

### **Mortgage Loan Officers**

Feel free to reach out to any of our Mortgage Loan Officers during the application process and they will be glad to guide you down the right path!

**Don Henderson** – (614) 416-7588 ext. 1412, dhenderson@pathwayscu.com, Gahanna/New Albany, AEP Building  
**Cristina Diaz** – (614) 276-6589 ext. 1245, cdiaz@pathwayscu.com, Casino District, Delaware, Plain City. \*Hablo Español  
**M. Joe Donovan** - (614) 462-6850 ext. 1101, jdonovsky@pathwayscu.com, Grandview

*\*Our Mortgage Loan Officers can come to the branch nearest you at any time, even if their main office is in a different location.*