

STUDENT LOAN REFINANCE CHECKLIST



PAYING BACK YOUR STUDENT LOANS JUST GOT EASIER.

Are you looking to consolidate multiple student loans into one simple payment? This checklist is designed to help you gather the information you need to apply. All you have to do is complete the three steps below to get started!

STEP 1 Compile loan payoff statements from your current student loan provider(s).

A loan payoff statement is a document that your current lender prepares to let us know your current student loan balance. A payoff statement includes: your full name, account number, payoff amount, payoff date, and the payoff address. Need help getting started? Feel free to use the chart below to help organize your student loans!

Lender Name	Name on Account	Account Number	Interest Rate	Current Balance	Monthly Payment
Total Amounts:					

STEP 2 Compile the following information:

- Past two years of personal tax returns
- Past two years of W-2s
- Most recent paystub from employer
- Copy of Driver's License
- Signed authorization (second page)

STEP 3 Get started today!

Get the application process started by completing our brief questionnaire at: <https://bankfirst.com/studentloanrefinance.html>

After you submit the online form, one of our experienced lenders will reach out to you to get the ball rolling!



BankFirst

SIGNATURE AUTHORIZATION

I/we Borrower's Name(s) hereby authorize Bank First, it's agents, successors and/or assigns to verify my past and present employment earnings, Social Security earnings, bank accounts, stock holdings and any other assets/balances that are needed to process my loan application.

I further authorize Bank First, its agents, successors and/or assigns to order a consumer credit report and verify other credit information, including past and present mortgage and landlord references. This form authorizes Bank First to request any loan payoffs required on my/our behalf.

I agree inform Bank First of any changes to my financial situation including any loss of income, employment change, incurring any new debts or an increase to an existing line of credit.

It is understood that a photocopy of this form will also serve as authorization.

The information the lender obtains is only for the use of the processing of my/our loan application.

BY:

Borrower's Name

Borrower's Name