



Home Equity Loan Checklist

Home Equity:

- Current Mortgage Statement for all properties owned
- Homeowners Insurance Declaration page for all properties owned
- Paystubs for the last 30 days (for all borrowers)
- Valid unexpired government issued identification for all borrowers
- Other, if applicable:
 - If self-employed, past two years full Federal Tax Returns
 - If receiving Social Security or Disability, most recent Social Security/Disability Awards Letters from the Social Security Administration
 - If receiving Pension or Retirement income, most recent Pension/Retirement 1099-R's
 - Copy of Trust (if applicable)
 - Most recent credit card statements or other loan/debt with payment address for all debts being paid off/consolidated (if consolidating)

Additional documentation may be requested upon review.