



Equity Application Checklist

In order to facilitate your request for a home equity loan, you will need to provide documentation to support the information on your application. We have listed the most commonly requested documents below so you can save time by gathering these items in advance and be ready to submit them along with your loan application. While additional documentation may be requested, this checklist can be used as a guideline to help you prepare for the loan process.

Your Source of Income

- Pay stubs: last 30 days
- W-2 or 1099 forms: last 2 years
- If self-employed: 2 years personal, partnership and corporate tax returns (as applicable), all schedules
- Award letters: Social Security, pension, disability, etc. (if applicable)

Additional Documentation

- Identification: copy of driver's license or identification
- Most recent mortgage statement
- Copy of homeowner's insurance declaration page
- If you own additional property: provide current lease agreements, a current mortgage statement
- Appraisal – if you have had an appraisal of your property completed in the past 6 months, let us know. We may be able to use it.