

Ready to apply for the financing?

Here's a quick reference checklist to help you gather the information you should have on hand when you apply for your home equity financing. Our friendly, knowledgeable loan specialists are here to help answer your questions and guide you through the process. Stop by your local branch, call, or [apply online](#) today!

Your Income:

- W-2 statement for the past 2 years
- Most recent pay stub showing 30 days of earnings and year-to-date earnings
- Two year history of employment—provide name and address(es) of employer(s) for the past 2 years
- If self-employed—last 2 years signed tax returns with schedules, year-to-date profit and loss statement, and business tax returns

Your Present Obligations:

- Last paid mortgage statement, real estate tax bill, declaration page of homeowners insurance and addresses of all real estate owned
- Creditor names, balances and minimum monthly payments on all open loans and credit cards

Other Items Needed:

- 2 most recent monthly statements on all retirement, banking and investment accounts (all pages)
- Pension and Social Security award letters

Notes and Questions for Your Lender:
