

Home Equity Application *Checklist*

Be prepared with the right documents.

Applying for a Home Equity Line of Credit (HELOC) or Home Equity Loan is easier when you have your financial information organized. While requirements may vary by borrower, this convenient checklist highlights common documents you may need to provide. Use it as a guide to get ready before you apply.

Documents You May Need:

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| ☐ Prior 2 years' addresses and dates of residence | ☐ Most recent Social Security awards statement (if applicable) |
| ☐ Most recent paystub (showing year-to-date income) | ☐ Most recent retirement account statement (if applicable) |
| ☐ Last 2 years' tax returns | ☐ Proof of flood insurance policy (if applicable) |
| ☐ Last 2 years' W-2s and/or 1099s | ☐ Proof of extra income, such as rental income, dividends, disability, pension, welfare, alimony, or child support (if applicable) |
| ☐ Most recent 2 months' bank statements | |
| ☐ Proof of homeowners insurance policy | |
| ☐ Property tax statement | |
| ☐ Most recent mortgage statement | |

Notes:

