

Checklist

Home Equity Line of Credit (HELOC) or Home Equity Loans

Copies of the following items are required before the loan can be assigned for processing:

Income Documentation

- Most recent pay stub covering the last 30 days, or retirement/pension income statement for each borrower
- Most recent two years of W-2s or equivalent (1099s) for each borrower
- Full, signed tax returns for the past two years if self-employed, commissioned, or sales-based income

Asset Documentation

- Two months of bank statements (checking and savings)
- Most recent retirement account statements

Property Documentation (provide for all properties owned)

- Recorded deed/title
- Recorded mortgage
- Homeowner's insurance declarations page
- Current mortgage statement (and second mortgage statement, if applicable)

Please note: This is a general list of items that may be required. Some may not apply to your specific loan request. After an underwriter reviews your file, additional documentation may be requested as needed.

Get started today:

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