

Home Equity Checklist

	Most Common Items Needed
	Copy of most recent paystub dated within 30 days of application
	Copy of W2 form for prior 2 years
	Copy of current monthly mortgage statement for all properties owned
	Copy of current home owners insurance declarations page for all properties owned (flood, if applicable)
	Copy of current real estate tax bill for all properties owned
	If the property is held in Trust, please provide a copy of the Trust

	If Self-Employed
	Copy of signed prior two years personal and business tax returns, all pages
	Signed year-to-date Profit and Loss Statement for current year (applications dated after April 15th)
	Signed year-to-date Profit and Loss Statement for prior year tax returns are not filed
	<i>Note: If rental property owners, copy of signed prior two years personal tax returns, all pages</i>

	If Retired
	Copy of Pension Award Letter
	Copy of Social Security Award Letter for current year
	<i>If investment/retirement income/distributions:</i>
	Copy of most recent 2 monthly (or most recent quarter) investment statements showing monthly disbursement
	Copy of most recent 2 monthly account statements showing receipt of monthly income
	Copy of most recent 2 years 1099Rs