

## Home Equity Application Document Checklist

- \_\_\_ Most recent 2 years W-2 statements
- \_\_\_ 1099 for retirement income, if applicable
- \_\_\_ 30 days of pay statements
- \_\_\_ Current home owner's insurance policy, showing annual premium, policy effective dates, and amount of dwelling coverage
- \_\_\_ 1<sup>st</sup> Mortgage most recent monthly statement, showing if the Mortgage payment includes taxes and insurance and the current mortgage balance
- \_\_\_ Current statement of all items to pay off, if applicable
- \_\_\_ Divorce decree & settlement statement, if applicable
- \_\_\_ 2 years full tax returns if self-employed
- \_\_\_ Are there Home Owners' Association or Maintenance Fees?  
If yes, please state the amount \_\_\_\_\_

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Other items may be requested once the application is in progress.

