

Home Equity Financing Checklist

Plan to have this information on hand when you apply for your home equity financing. If you have a question about an item, print this checklist and write the your question in the **notes and reminders** space below.

Identity/income verification

- Name, address, and phone number
- Government-issued photo ID and Social Security number (for joint loans, include co-applicant's SSN as well)
- Monthly income (all sources)
- Pay stub
- Monthly debt obligations
- Financial assets
- Employer name
- Occupation and length of time in profession
- Length of time in current position
- W-2 from current employer, or, if employed with this employer less than two years, from former employer
- Business phone number

Income verification — self-employed

- Federal tax returns (personal and business) for the past three years
- Profit and loss statement — year-to-date
- List of all business debts

Property information

- Estimated market value of your home
- Property purchase price and year
- Estimated mortgage balance and monthly payment, including real estate taxes and homeowners insurance declaration page

Additional documents

Once your application is reviewed, we may request additional information from you. That information could include:

- Personal and business tax returns
- Financial documents, such as bank and other asset statements
- Flood insurance declaration page

Notes and reminders

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