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

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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