

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, mailing address, and phone number
- Monthly income (all sources)
- Pay stub (30 days)
- Monthly debt obligations
- Financial assets
- Employer name and Phone #
- 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 for the past 2 years, from former employer

Income verification — self-employed

- Federal tax returns (personal and business) for the past two years
- Profit and loss statement — year-to-date

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
 - Homeowners insurance information including agent name and phone number

Notes and reminders

Visit eeecu.org/HomeLoanCenter

 Live Chat

 Set an Appointment

 Call 817-882-0181