Home Equity Loan, Home Equity Line of Credit, and Auto Loan Application Checklist

- ☐ Photo ID (State-issued Driver's License or ID)
- ☐ Full legal name, Social Security number, and date of birth
- ☐ Primary phone number, email address, current and former residential mailing addresses (past two years)
- ☐ Income amount, including secondary income sources, in the form of your most recent W-2s and at least two of your most recent pay stubs. If self-employed, provide complete copies of your last two personal and business federal tax returns including all Schedules, 1099, K-1s, W-2s, and evidence of filing
- ☐ Name, address, and phone number of all employers (past two years)
- ☐ Be prepared to provide your most recent bank statements and other asset account statements if requested
- ☐ Current housing expense or a copy of your most recent mortgage billing statement (if applicable)

Additionally, if applying for an auto loan:

- ☐ Description of collateral: Auto year, make, model, VIN, and purchase price
- ☐ Insurance agent name and address
- ☐ Purchase agreement, bill of sale, or copy of title

This may not be a complete list. After we review your application and documents, your loan officer may request additional information if necessary.