



2nd Mortgage Documentation Checklist / HELOC

To process your Mortgage Loan Application quickly and efficiently, it is highly recommended that you bring the following documentation at the time of application. Application may be submitted in person or online at our website:

www.treadwellcu.com .

- ☐ Verification of income for loan amount of \$50,000.00 or less:
 - ☐ 30 days of most recent paystubs.
 - ☐ 2 most recent years W2's
 - ☐ Retirement, Social Security, &OR Disability Award letter for the current year
 - ☐ If self-employed, 2 most recent years of both personal and business tax returns, Including k-1
- ☐ Verification of income for loan amount of \$50,000.01 or more:
 - ☐ Last 2 years of Federal Tax returns with W2's or 1099's (Include all schedules).
 - ☐ 30 days of most recent paystubs.
 - ☐ Retirement, Social Security, &OR Disability Award letter for the current year
 - ☐ If self-employed, 2 most recent years of both personal and business tax returns, Including k-1
- ☐ Refinance- include the following
 - ☐ Copy of 1st mortgage statement
 - ☐ Copy of Homeowners insurance policy
- ☐ Miscellaneous (if applicable)
 - ☐ Copy of Divorce Decree
 - ☐ Court Order for Child Support Payments
 - ☐ Copy of Bankruptcy Discharge
 - ☐ Copy of Foreclosure documents
- ☐ Copy of Condo Association By-Laws- include contact information, address, & phone number(s)

For further questions or to schedule an appointment contact:

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