

## HOME EQUITY LINE OF CREDIT

Please provide the following documents for processing of your Home Equity Line of Credit

- ❑ Copy of pay receipt for the last 2 months
- ❑ Copies of W-2 forms for the last 2 years
- ❑ Homeowners or fire insurance policy
- ❑ Copy of your most recent property tax bill
- ❑ Copies of your last 2 months bank statements for all checking, savings, money market, retirement accounts (**excluding** your SRI Federal Credit Union accounts)
- ❑ Copy of most recent mortgage statement (1st mortgage & 2nd mortgage if applicable)
- ❑ **Rental Properties:**
  - Copy of rental/lease agreements for rental properties
  - Copy of most recent mortgage statement for rental property
  - Copy of your income tax returns for the last 2 years

### **If Self Employed**

- ❑ Copies of your income tax returns for last two (2) years
- ❑ A certified Profit & Loss Statement signed by an accountant

### **If Retired**

- ❑ Copies of your income tax returns for the last two (2) years

## TALK WITH US TODAY

Lending 650.859-5477 – FAX 650.326-8916– email: [lending@srifcu.org](mailto:lending@srifcu.org) – [www.srifcu.org](http://www.srifcu.org)

**SRI Federal Credit Union**

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