

Home Equity Checklist



Thank you in advance for choosing CornerStone Bank* to care for your financial needs. In order for us to efficiently and successfully process your loan request, please return the following items with your signed loan package:

Enclosed: Items Needed:

- Last 2 years W2's
- Last 2 years tax returns- all pages and schedules- both business and personal if applicable-
****Please sign the bottom of page 2 of the 1040****
- 1 month of paycheck stubs
- 2 months of bank statements all accounts and all pages (including retirement accounts)
- Name phone number of:
 - Attorney
 - Homeowner's Insurance
- Copy of Driver's License(s)
- If you receive Social Security, copy of the yearly statement showing the monthly amount if it is not shown as a direct deposit on the bank statements
- If refinance, statements of all debts to be paid off
- If you own rental properties items needed:
 - Copies of Leases
 - Copies of mortgage statements showing that the homeowner's insurance & taxes are escrowed in the monthly payment- if not need the property tax bill and homeowners insurance billing statement
- Copy of current tax assessment
- Copy of existing mortgage statement

◆ CornerStone *Cares* ◆

CORNERSTONE BANK

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