

# What to Bring: Mortgage Application

Applying for a new membership account or loan product is fast and easy!

You will need the following information to apply for a loan product:

- A primary ID – Government issued
- Secondary ID – Additional document with your name such as Debit/Credit/Membership Card
- Your complete physical and mailing address
- Social Security Number
- Date of Birth
- Some appointment types require additional documentation, see below.

## Purchase

- Recent Paystub & W2s for the previous 2 years for all borrowers
- If Self-Employed, tax returns for the previous 2 years including all schedules and statements
- Purchase Agreement and all addendums
- 2 months of Bank Statements
- Recent statement for retirement funds, if using

## Refinance

- Recent Paystub & W2s for the previous 2 years for all borrowers
- If Self-Employed, tax returns for the previous 2 years including all schedules and statements
- Current Homeowners Insurance
- Recent Mortgage Statement

## Construction

- Recent Paystub & W2s for the previous 2 years for all borrowers
- If Self-Employed, tax returns for the previous 2 years including all schedules and statements
- Construction Contract
- Construction Plans/Blueprints

