

Loan Checklist



To complete your Loan application you will need the following:

Personal & Contact Information (Auto, Credit Card, HELOC, or Personal Loan)

- Full Name
- Date of Birth
- Social Security Number
- Citizenship
- Email Address
- Home Address
- Home Telephone Number
- Previous Address (if at current address less than 2 years)
- Residence Status (own or rent)
- Monthly Mortgage or Rent Payment

Employment & Income Information (Auto, Credit Card, HELOC, or Personal Loan)

- Employment Status
- Occupation
- Work Phone Number
- Employer Name
- Previous Employer (if at current employer less than 2 years)
- Gross Monthly Income Amount and Income Sources
- Two most recent Paystubs (or last 2 years Tax Returns if self-employed)

Auto Information

- Year (possibly make, model, and VIN if you're refinancing)
- Purchase price and down payment amount
- 10-day payoff if you are refinancing
- Seller (e.g. dealerships, person-to-person, other)

Credit Information

If you have put a freeze on your credit, you must unfreeze your credit before applying for a Loan. Associated Credit Union cannot unfreeze your credit on your behalf.

Next Steps (HELOC)

After you have completed your HELOC application, have the following documents ready:

- Homeowner's Insurance
- Most Recent Mortgage Statement
- W-2
- Current 30-Day Paystub with YTD Income