

# Ready to apply for a Home Equity Line of Credit (HELOC)?

## Here's what you'll need to prepare.

### Personal Information for Applicant and Co-applicant (if applicable)

- First and last name
- Email address (optional)
- Phone number
- Date of birth
- Social Security Number
- Marital status
- Residential status
- Address (mailing and physical)
- Length of residence
- Valid ID (US passport, state-issued ID, or driver's license)

### Application Information

- Loan amount
- Loan purpose

### Employment and Income Information for Applicant and Co-Applicant (if applicable)

- Gross annual income
- Income source
- Employment status, employer name and years of employment (if applicable)
- Occupation and years of occupation

### Collateral Information

- Collateral property address and county
- Estimated property value
- Purchase price
- Purchase date
- Property type/sub-type (primary or secondary home/ single family, condo, or townhome)
- Ownership/title Information (all title holders)
- Are there any active mortgages on the property?
  - Mortgage provider
  - Monthly mortgage payment
  - Mortgage balance
  - Is mortgage being paid off by HELOC?
- HOA fees
- Are taxes and insurance escrowed?
- Annual taxes
- Annual insurance

### Additional Property (if applicable)

- Total monthly expense
- Property address
- Estimated property value
- Institution
- Current balance

### Auto Pay Information (if applicable)

Will Auto Pay be set up from a Popular Bank account or external account? If so, please provide routing number and account number. *Note: A discount of 0.25% will be applied if Auto Pay is set up.<sup>1</sup>*

### Let's get started

Visit your local branch or call our Customer Care Center at 1.888.317.9062 to begin your application.

