

JEFFERSON PARISH EMPLOYEES FEDERAL CREDIT UNION
Items Needed for Mortgages & Home Equity Line of Credit (HELOC)
Application

1. Copy of latest property tax bill
2. Copy of statement or printout of present mortgage balance
3. Copy of latest declaration of homeowners and flood insurance
4. **(Once we have the pre-approval)** – Need check for appraisal
5. **Completed** and signed mortgage application. Include name, property address, SS#, loan amount, estimated value of property, balances on all loans, credit cards, savings, and checking account.
6. Most recent 2 paycheck stubs
7. Current 2 months bank statements for each account. The following information must appear on the statements: Bank or institution name, borrower(s) name(s), account number. The statement must contain all pages (for example, if statement is 6 pages, we need all 6 pages) We can obtain JPEFCU statements
8. Last two years of IRS tax returns with schedules (**for self employed, commission, and rental income**)
9. Last two years W-2s and/or 1099 form for income
10. Copy of Purchase Agreement (**for a purchase**)
11. Copy of valid driver's license
12. Name and phone number for Human Resources Dept. or Payroll Dept. contact person.

Please contact the Mortgage Department when completed. Once we get everything in we'll start the processing the loan. Please let us know if you have any questions.

Terry Fallon, Mortgage Department Manager at 504-736-6157, tfallon@jpefcu.org.
NMLS#442013

Amanda Zeller, Mortgage Officer at 504-818-3514, azeller@jpefcu.org.
NMLS #1955824