



Where Life Experiences Are Understood

Thank you for your interest in our Mortgage Program. Listed below is the required documentation you will need to provide at the time of application, for each borrower:

Pre-Approvals *

- Driver's License or Valid ID
- Most recent Pay Stub

Purchase *

- All Pay Stubs dated within the past 30 days
- Proof of Social Security or Pension Plan (1099 or award letter)
- Prior 2 Years of W2's
- Prior 2 Years of Federal Tax Returns, including all schedules
- Prior 2 Months of Bank Statements from other financial institutions
- Purchase Contract
- Quote or Homeowners Insurance

For Refinance Transactions, Home Equity Loans or Home Equity Line of Credit *

- All Pay Stubs dated within the past 30 days
- Proof of Social Security or Pension Plan (1099 or award letter)
- Prior 2 Years of W2's
- Prior 2 Years of Federal Tax Returns, including all schedules
- Prior 2 Months of Bank Statements from other financial institutions
- Current Mortgage Statement, if applicable
- Copy of Homeowners Insurance Policy

* Additional information may be required from Underwriting

After you have gathered the required documentation, please call or e-mail to schedule an appointment.

Thank you,



Beth E. Becker

VP of Home Lending

Abbey Credit Union, Inc.

Email: beth.becker@abbeycu.com

Office: 937-795-1089 ext. 133 | Cell: 937-307-8910 | Fax: 937-898-7803

Vandalia Home Branch:
Troy Branch:
West Milton Branch:

800 Falls Creek Drive, Vandalia, Ohio 45377
891 West Market Street, Troy, Ohio 45373
1165 South Miami Street, West Milton, Ohio 45383

Phone: 937-898-7800
Fax: 937-898-7803
www.abbeycu.com

