



Loan Documentation Checklist

We know you had a choice so we thank you for choosing Ace Mortgage Group, Inc. In order to process your loan as quickly as possible, please submit the following items:

- Complete signed application
- Two Recent Pay Stubs
- A copy of a government photo ID
 - (Drivers License, Passport, or Alien Registration, etc...)

- **TWO MOST RECENT YEARS**
 - W2's
 - Personal Tax Returns
 - Corporate Tax Returns with K-1 Forms
 - Partnership Tax Returns
 - 1099's & W-2 Forms for pension and/or Social Security Income (and/or Award Letters)
 - Divorce Decree with Property Settlement and Child Support Agreements
 - Copy of Bankruptcy and Final Discharge papers

- **TWO MOST RECENT MONTHLY/ANNUAL STATEMENTS**
 - Checking Accts.
 - Saving Accts.
 - Money Market Accts.
 - CD's
 - Stocks/Bonds
 - IRA
 - Gift letter and Verification of Gift Funds
 - Purchase Contract
 - Rental Agreement(s)
 - Have copy of NOTE on Second Mortgage (If Subordinating)
 - Credit Explanation letter
 -

If you should have any questions, please do not hesitate to give us a call.

Sincerely,

Lorisa M. McKelvey,
Certified Mortgage Planning Specialist

Ace Mortgage Group, Inc.
Located in Old Town Salinas, Upstairs of the Glikbarg Building
6 W. Gabilan Street Ste. 9 Salinas, CA 93901
Tel: (831) 240-0032 / Fax: (831) 676-3440
Lorisa@HelpUinvest.com