



# Mortgage Application

Please complete each section and sign your application for prompt and accurate processing.

## Please Tell Us About Yourself

### BORROWER

TITLE: FIRST NAME: LAST NAME:

RES PHONE: BUS PHONE:

CELL/PAGER: EMAIL:

BIRTH DATE: MONTH DAY YEAR

SOCIAL INSURANCE NO:

MARITAL STATUS:

MARRIED  SINGLE  DIV./SEP.  NO. OF DEPENDENTS  
 COMMON-LAW  ENGAGED  WIDOWED (EXCLUDE SPOUSE) \_\_\_\_\_

HOW DID YOU HEAR ABOUT US? \_\_\_\_\_

PRESENT ADDRESS:

UNIT #: YEARS AT RESIDENCE:

CITY: PROVINCE: POSTAL CODE:

DO YOU OWN OR RENT? CURRENT RENT  
 RENT  OWN  \$ \_\_\_\_\_

IF YOU HAVE LIVED HERE LESS THAN THREE YEARS, WHAT WAS YOUR PREVIOUS ADDRESS?

PREVIOUS ADDRESS:

UNIT# YEARS AT THAT RESIDENCE:

CITY: PROVINCE: POSTAL CODE:

### CO-BORROWER

TITLE: FIRST NAME: LAST NAME:

RES PHONE: BUS PHONE:

CELL/PAGER: EMAIL:

BIRTH DATE: MONTH DAY YEAR

SOCIAL INSURANCE NO:

RELATIONSHIP TO BORROWER:

MARRIED  INVESTOR  
 COMMON-LAW  ENGAGED  OTHER

PRESENT ADDRESS:

UNIT #: YEARS AT RESIDENCE:

CITY: PROVINCE: POSTAL CODE:

DO YOU OWN OR RENT? CURRENT RENT  
 RENT  OWN  \$ \_\_\_\_\_

IF YOU HAVE LIVED HERE LESS THAN THREE YEARS, WHAT WAS YOUR PREVIOUS ADDRESS?

PREVIOUS ADDRESS:

UNIT# YEARS AT THAT RESIDENCE:

CITY: PROVINCE: POSTAL CODE:

Our Mortgage Professionals have the knowledge and expertise to get you the Right Mortgage. With access to over 30 lenders and coast-to-coast service, we can provide you with the choice, convenience, and counsel you deserve. All at no cost to you on approved credit! When you use the Right Broker, you get the Right Mortgage. Please pass on my name and number to at least one person you know - Thank you!

**Choice, Convenience and Counsel**

# Tell Us About Your Employment

## BORROWER

CURRENT EMPLOYER: \_\_\_\_\_

ADDRESS / DEPARTMENT: \_\_\_\_\_

CITY / PROVINCE: \_\_\_\_\_

JOB TITLE / POSITION: \_\_\_\_\_

YEARS THERE: \_\_\_\_\_ FULLTIME \_\_\_\_\_ PART TIME \_\_\_\_\_ SEASONAL \_\_\_\_\_

HOW MANY YEARS IN THIS LINE OF BUSINESS? \_\_\_\_\_

GROSS ANNUAL INCOME (BEFORE TAXES): \_\_\_\_\_

DO YOU COLLECT / EARN OTHER INCOME? DETAILS: \_\_\_\_\_

**IF LESS THAN THREE YEARS, WHERE DID YOU WORK PREVIOUSLY?**

PREVIOUS EMPLOYER: \_\_\_\_\_

GROSS ANNUAL INCOME: \_\_\_\_\_

JOB TITLE / POSITION: \_\_\_\_\_ YEARS THERE: \_\_\_\_\_

## CO-BORROWER

CURRENT EMPLOYER: \_\_\_\_\_

ADDRESS / DEPARTMENT: \_\_\_\_\_

CITY / PROVINCE: \_\_\_\_\_

JOB TITLE / POSITION: \_\_\_\_\_

YEARS THERE: \_\_\_\_\_ FULLTIME \_\_\_\_\_ PART TIME \_\_\_\_\_ SEASONAL \_\_\_\_\_

HOW MANY YEARS IN THIS LINE OF BUSINESS? \_\_\_\_\_

GROSS ANNUAL INCOME (BEFORE TAXES): \_\_\_\_\_

DID YOU COLLECT / EARN OTHER INCOME? DETAILS: \_\_\_\_\_

**IF LESS THAN THREE YEARS, WHERE DID YOU WORK PREVIOUSLY?**

PREVIOUS EMPLOYER: \_\_\_\_\_

GROSS ANNUAL INCOME: \_\_\_\_\_

JOB TITLE / POSITION: \_\_\_\_\_ YEARS THERE: \_\_\_\_\_

# Tell Us About Your Finances

### ASSETS (MARKET VALUE)

### LIABILITIES

### FINANCIAL INSTITUTION

### PAYMENT/MO.

### TOTAL DEBT

PRINCIPAL RESIDENCE \_\_\_\_\_ CURRENT MORTGAGE \_\_\_\_\_

CASH / SAVINGS \_\_\_\_\_ PERSONAL LOANS \_\_\_\_\_

STOCKS / BONDS \_\_\_\_\_ LINE OF CREDIT \_\_\_\_\_

AUTO (YR., MAKE, MODEL) \_\_\_\_\_ CAR PAYMENT \_\_\_\_\_

AUTO (YR., MAKE, MODEL) \_\_\_\_\_ CAR PAYMENT \_\_\_\_\_

RRSP'S (AMT. & INSTITUTION) \_\_\_\_\_ RRSP LOAN \_\_\_\_\_

OTHER REAL ESTATE \_\_\_\_\_ OTHER MORTGAGE \_\_\_\_\_

PERSONAL EFFECTS \_\_\_\_\_ CREDIT CARDS \_\_\_\_\_

# We Need Your Authorization

By signing below you affirm that the information you have given in this Application is true and complete and that you have not withheld any information. We will rely on the information you have given to decide on your Application. You also agree to the terms below.

Date

Applicant Signature

Co-Applicant's Signature

**CONSENT TO COLLECT AND USE PERSONAL INFORMATION**

When you apply for a mortgage with us, you agree that:

- 1) We may collect and use personal information from you and about you for the following purposes: (a) to understand your needs (b) to determine the suitability of our products and services for you (c) to determine your eligibility for our products and services (d) to establish, manage and offer products and services that meet your needs (e) to provide on-going service and (f) to meet our legal and regulatory requirements.
- 2) We may use, give to, obtain, verify, share and exchange credit and other information about you with others including credit bureaus, mortgage insurers, credit insurers, registries and other persons with whom you may have financial dealings, as well as any other person as may be permitted or required by law. You also authorize any person whom we contact in this regard to provide such information to us.

We may ask you for your Social Insurance Number to use in verifying and reporting credit information to credit bureaus and credit reporting agencies. You may refuse to consent to its use or disclosure for these purposes.

EMPLOYMENT FINANCIAL SIGNATURE

# If you know the details and type of mortgage you are looking for please tell us ...

### Loan Type:

- First Mortgage  
 Second Mortgage

### Purpose of Mortgage Funds

- Purchase of new property  
 Renewal/Switch of existing mortgage  
 Debt Consolidation  
 Equity Takeout/Investment

House  Townhouse  Condo

Year Purchased \_\_\_\_\_

Purchase Price \_\_\_\_\_

### Term Requested:

- (6 months to 25 years)  
 Closed  Open  
 Fixed Rate  Variable Rate  
 Cash Back  Free Down Payment

Amortization: \_\_\_\_\_ (5 to 25 years)  
 NOTE: If Renewal/Switch, the remaining amortization on your existing mortgage will be used.

### Payment Frequency:

- Weekly  Monthly  
 Bi-Weekly  Semi-Monthly  
 (26 payments/year) (24 payments/year)  
 Accelerated

### Interest Rate:

# %

### Property Taxes:

- Include with mortgage payment  
 Paid directly by borrower

Most lenders insist that property taxes be included with your mortgage payment if the mortgage is high-ratio insured.

## We're Listening

With regards to your financing, please tell us anything that is important to you so we can serve you better.

---

Are you working with any other real estate professionals? (e.g. realtor, lawyer) If so, please provide their contact information. If not, we would be happy to offer any recommendations to people we have used in the past.

---

Do you know anyone else interested in a mortgage? Please provide us with their contact information.

---

Please gather the following documents to help us get you the best mortgage possible.

Employment Letter	Current Pay Stub	Bank/RRSP Statements	NOA
H.O. Insurance	Prop Tax Assess.	Prop Tax Receipt	Mortgage Statement

## Tell us about your property

Building Type _____	# of Bedrooms _____	# of Fireplaces _____
Water Supply _____	Basement _____	MLS # _____
Sewer Type _____	Square Footage _____	Property Taxes _____
Year Built _____	# of Bathrooms _____	Strata Fees _____

## If you own rental properties, please provide us with details

Address: \_\_\_\_\_

- Condo  Townhouse  House

Purchase Price & Date: \_\_\_\_\_

Current Value: \_\_\_\_\_

Mortgage Balance: \_\_\_\_\_

Maturity Date: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Financial Institution: \_\_\_\_\_

### MONTHLY INCOME

Gross Income \_\_\_\_\_

*Can you provide a residential tenancy agreement to verify your property's rental income?*

- Yes  No

*Can you provide a recent property tax assessment or property appraisal to verify your property's value?*

- Yes  No

### MONTHLY INCOME

Mortgage Payment \_\_\_\_\_

Property Taxes \_\_\_\_\_

Insurance \_\_\_\_\_

Utilities \_\_\_\_\_

*Can you provide a mortgage statement to verify your property's mortgage balance and payment amount?*

- Yes  No