

# 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 40 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

Consent to collect and use personal information

I/We warrant and confirm that the information given in the mortgage application form is true and correct and I/we understand that it is being used to determine my/our credit responsibility. You are authorized to obtain any information you may require relative to this application from any sources to which you may apply and each such source is hereby authorized to provide you with such information. You are furthermore authorized to disclose, in response to direct enquiries from any other lender or credit bureau, such information on my loaning account as you consider appropriate, and I agree to indemnify you against and save you harm from any and all claims in damages or otherwise arising from such disclosure on your part. You are also authorized to retain the application whether or not the relative mortgage is approved.

\_\_\_\_\_ Date

\_\_\_\_\_ Applicant's Signature

\_\_\_\_\_ Co-applicant's signature

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.

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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.

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

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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