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Personal

Name of Applicant (first name, family name)		Marital Status	Birth Date (mm/dd/year)		SIN # (optional)
Full Present Address (#, street, city)		postal code	How Long	Home Phone Number (plus area code)	
Previous Address (if current address less than 3 years)			How Long	# of Dependents	Rent \$
Applicant's Employer	Position		How Long	Work # (plus area code)	Income (C\$) \$
Previous Employer (if less 3yr)	Position	How Long	Previous Employer	Position	How Long
Other Sources of Income (Pension, Part-time job, Investments, etc.)					C (\$) \$
Name of Co-Applicant (first name, family name)		Marital Status	Birth Date (mm/dd/year)		Social Insurance #
Full Present Address (#, street, city)		postal code	How Long	Home Phone Number (plus area code)	
Co-Applicant's Employer	Position		How Long	Work # (plus area code)	Income (C\$) \$
Previous Employer	Position	How Long	Previous Employer	Position	How Long
Other Sources of Income (Pension, Part-time job, Investments, etc.)					C (\$) \$

Financial Net Worth

Assets	Value (C\$)	Liabilities	Value (C\$)
Cash, Deposits, G.I.C.	\$	Credit Cards	\$
RRSP	\$	Credit Cards	\$
Stock and Bonds	\$	Line of Credit	\$
Vehicle	\$	Car Loan	\$
Residence (if owned)	\$	Mortgage (residence)	\$
*Other Real Estate (see schedule A: total value)	\$	**Rental Property (totals-see schedule A)	\$
Other Assets	\$	Other Debts	\$
	\$		\$
	\$		\$
Total Assets		Total Debts	

Details of Mortgage (For new purchase only)

Purchase Price:	Address of Property:
Down Payment:	Taxes:
Mortgage Amount:	Condo Fees:
Interest Term:	Rental Income:
Amortization period:	
Source of Down Payment:	Payment Frequency:
Lawyer Info:	Real Estate Agent:

Credit References

Main Financial Institution (Personal Account Location)	Other Financial Institution	Location
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Loans (institution name)	Location	Limit	Balance	Monthly Payment
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

Schedule A

Existing Mortgages/Properties

Property Address:	Mortgage Amount:
Lender:	Rate:
Mortgage Type (1st/2nd):	Maturity Date:
Property Value:	Monthly Payment:
Purchase Date:	Monthly Rental Income:

Property Address:	Mortgage Amount:
Lender:	Rate:
Mortgage Type (1st/2nd):	Maturity Date:
Property Value:	Monthly Payment:
Purchase Date:	Monthly Rental Income:

Applicant Comments

Let us know who referred you:	Do you prefer communication by email or phone ?

CLIENT SERVICES AGREEMENT, AUTHORIZATION & CONSENT

This is an agreement between (your name(s)) and Mortgage Broker Name

I/We warrant and confirm that the information given in the mortgage application form is true and correct. You are authorized to collect my personal information (collectively, "Information"), including credit reports and other financial information, from and disclose such Information to your affiliates and services providers and other third parties such as credit reporting agencies, credit bureaus, credit grantors, insurers, government registries and those income sources and personal references that I advise to you. In particular, I understand that you will share my Information with connection with a mortgage or other loan transaction that you may arrange on my behalf. My information will be collected, used and disclosed for the following purposes: (i) to provide mortgage brokering services, including arranging and/or renewing loan(s)/mortgage(s), (ii) to evaluate my credit application and verify my creditworthiness and to open, operate and collect on my account(s); (iii) to verify my identity and for internal audit; (iv) to meet legal and regulatory requirements; and (v) for statistical and record keeping purposes, and (vi) to inform me of other financial options and products and services offered or approved by you or by select third parties that may be of interest to me. I may have my name removed from your solicitation lists by contacting you at:

You are also authorized to retain my information whether or not the mortgage is approved. You may use the services of any financial institution or other reliable third party of your choice as your agent or service provider. In particular, you may use affiliated companies and/or third parties in Canada. I understand that, as a result, my Information may be accessed under applicable laws of Canada. Whenever Information is transferred to an agent or service provider, you will require them to protect my information to the standards of confidentiality and security adhered to by you.

The XXXX Privacy Policy is available at www.XXX.ca. I understand that I may access my Personal Information in your possession or make corrections to it, by writing to the Chief Privacy Officer at the above address.

Your Signature

Mortgage Brokers Signature

Date Signed

Date Signed