



350 Main Street E #B Milton, ON L9T 1P6 – Brokerage Lic. # 11616

Mortgage Application

Applicant Information <i>(Two pieces of ID required- one photo NO Health Card)</i>		Application Type Approval/Pre-Approval		Application Purpose New Purchase/Refinance or Switch		
Full Name		S.I.N.		Date of Birth	Dependants	Marital Status
				Month/Day/Year		
ID Type (2 required – Drivers License, Passport, Other):	ID Number:	ID Type:		ID Number:		
Present Address		Postal Code		Rent/Own	No. of Years	
				\$		
Previous Address (if less than 3 years at current)				Rent/Own	No. of Years	
				\$		
Home Phone:		Home Fax:		Cellular:		
Bus Phone:		Bus Fax:		Email:		
Current Employer		Years	Gross Annual Income	Job Title		
Address				Industry		
Past Employer (if less than 3 years at current)		Years	Gross Annual Income	Job Title		
Address & Phone				Industry		

Co-Applicant Information *(Two pieces of ID required- one photo NO Health Card)*

Full Name		S.I.N.		Date of Birth	Dependants	Marital Status
ID Type (2 required – Drivers License, Passport, Other):	ID Number:	ID Type:		ID Number:		
Present Address		Postal Code		Rent/Own	No. of Years	
				\$		
Previous Address (if less than 3 years at current)				Rent/Own	No. of Years	
				\$		
Home Phone:		Home Fax:		Cellular:		
Bus Phone:		Bus Fax:		Email:		
Current Employer		Years	Gross Annual Income	Job Title		
Address				Industry		
Past Employer (if less than 3 years at current)		Years	Gross Annual Income	Job Title		
Address & Phone				Industry		



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Assets

Liabilities (pulled from bureau)

Bank & Location	Type	Balance
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RRSP:		
Stocks/Bonds/GIC:		
Automobile:		
Automobile:		
Other Assets:		
Household Goods:		

Bank Loan/LOC:	Balance:
Bank Loan/LOC:	Balance:
Credit Card:	Balance:
Credit Card:	Balance:
Car Loan:	Balance:
Car Loan:	Balance:
Other Debt:	Balance:
Other Debt:	Balance:

Current Mortgages/Properties Owned:

Address:			Property Value:
Occupancy:	Monthly Rent (if applicable):	Purchase Date:	Purchase Price:
Existing Mortgage Lender:		Type: First/Second	Balance:
Payment:	Frequency:	Rate Type:	Maturity:
Loan Type:	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:
Existing Mortgage Lender:		Type: First/Second	Balance:
Payment:	Frequency:	Rate Type:	Maturity:
Loan Type:	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:

Address:			Property Value:
Occupancy:	Monthly Rent (if applicable):	Purchase Date:	Purchase Price:
Existing Mortgage Lender:		Type: First/Second	Balance:
Payment:	Frequency:	Rate Type:	Maturity:
Loan Type: Open/Closed	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:
Existing Mortgage Lender:		Type: First/Second	Balance:
Payment:	Frequency:	Rate Type:	Maturity:
Loan Type: Open/Closed	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:

Address:			Property Value:
Occupancy:	Monthly Rent (if applicable):	Purchase Date:	Purchase Price:
Existing Mortgage Lender:		Type: First/Second	Balance:
Payment:	Frequency:	Rate Type:	Maturity:
Loan Type: Open/Closed	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:
Existing Mortgage Lender:		Type: First/Second	Balance:
Payment:	Frequency:	Rate Type:	Maturity:
Loan Type: Open/Closed	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:



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Subject Property:

Address			Property Value		
Occupancy Owner Occupied/Rental	Monthly Rent (if applicable)	Purchase Date		Purchase Price	
Construction Type Existing/New	Type Detached/Semi-Detached/Townhouse/ Duplex/Appt. Lowrise/Appt. Highrise	Condo Fees?	Include Heat?	Living Space	Lot Size
Number of Units	Number of Floors	Age		Garage Size	Attached/Detached
Taxes	Do you want taxes paid with your mortgage Yes/No	Heat type Forced Air/Radiator/Base Board		Water & Sewer	

Existing Mortgage (if applicable):

Existing Mortgage Lender:		Type: First/Second	Balance:		
Payment:	Frequency:	Rate Type: Fixed/Variable/Blended	Maturity:	Original Amortization:	
Loan Type: Open/Closed	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:		
Existing Mortgage Lender:		Type: First/Second	Balance:		
Payment:	Frequency:	Rate Type: Fixed/Variable/Blended	Maturity:	Original Amortization:	
Loan Type: Open/Closed	Interest Rate:	Type: Mortgage/Line of Credit	Original Mortgage Amount:		

Requested Mortgage:

Type: First/Second	Type: Mortgage/Line of Credit	Rate Type: Fixed/Variable	Loan Type: Open/Closed	Requested Amount:
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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. I/We authorize ProFunding Financial Services Inc. to obtain and/or exchange personal information with any personal information agent towards establishing or verifying my financial standing. 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.

Signature:		Date
Signature:		Date

PURCHASE: 1 – 4 DOCUMENTS REQUIRED FOR PRE-APPROVAL – providing accurate information will help ensure the best type of mortgage suitable for you.

- 1 Completed mortgage application
- 2 Consent form to obtain your credit report
- 3 Client information/suitability form
- 4 ID verification – 2 pieces - 1 Photo ID such as Drivers License, PRC, Passport, Credit Card, SIN (Health Cards cannot be used)
- 5 **Income verification: Employed:** Job letter stating start date, hourly/salary amount, hours of work per week, last 2 paystubs, 2 years NOA if applicable
 - a. Other applicable income: child tax, universal tax, child support, alimony, rental income, etc.,
 - b. **Self-employed:** Business registration, TA general, NOA
- 6 Down payment & closing costs: last 3 month bank statements from down payment resources, RRSP, TFSA, etc.,
- 7 Property to be financed: Purchase & Sale agreement, Amendments (if any), MLS listing, Copy of deposit to seller

REFINANCE:

- Items 1 – 6 required, as well as . . .
- Current mortgage statement
- Property tax info

Please fax or email completed application – if you have any questions please do not hesitate to call.