

# Mortgage assessment application form



## PERSONAL INFORMATION

### APPLICANT

E-MAIL ADDRESS \_\_\_\_\_

NAME \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SIN \_\_\_\_\_ MARITAL STATUS \_\_\_\_\_

OWN/RENT \$ \_\_\_\_\_ ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ PC \_\_\_\_\_  
DEPENDANTS \_\_\_\_\_

HOME TEL: ( ) \_\_\_\_\_ HOW LONG @ PRESENT ADDRESS? \_\_\_\_\_ WORK TEL. ( ) \_\_\_\_\_

EMPLOYER \_\_\_\_\_ OCCUPATION \_\_\_\_\_ ANNUAL INCOME \_\_\_\_\_  
\*\*

HOW LONG HAVE YOU WORKED THERE? \_\_\_\_\_ (IF LESS THAN 3 YEARS PLEASE PROVIDE PREVIOUS EMPLOYER)

EMPLOYER \_\_\_\_\_ OCCUPATION \_\_\_\_\_ ANNUAL INCOME \_\_\_\_\_

HOW LONG HAVE YOU WORKED THERE? \_\_\_\_\_ OTHER INCOME \_\_\_\_\_ SOURCE \_\_\_\_\_

### CO-APPLICANT

**\*\* IF SELF-EMPLOYED, 2 YEAR NET INCOME AVERAGE IS REQUIRED**

E-MAIL ADDRESS \_\_\_\_\_

NAME \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SIN \_\_\_\_\_ MARITAL STATUS \_\_\_\_\_

OWN/RENT \$ \_\_\_\_\_ ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ PC \_\_\_\_\_  
DEPENDANTS \_\_\_\_\_

HOME TEL: ( ) \_\_\_\_\_ HOW LONG @ PRESENT ADDRESS? \_\_\_\_\_ WORK TEL. ( ) \_\_\_\_\_

EMPLOYER \_\_\_\_\_ OCCUPATION \_\_\_\_\_ ANNUAL INCOME \_\_\_\_\_  
\*\*

HOW LONG HAVE YOU WORKED THERE? \_\_\_\_\_ (IF LESS THAN 3 YEARS PLEASE PROVIDE PREVIOUS EMPLOYER)

EMPLOYER \_\_\_\_\_ OCCUPATION \_\_\_\_\_ ANNUAL INCOME \_\_\_\_\_

HOW LONG HAVE YOU WORKED THERE? \_\_\_\_\_ OTHER INCOME \_\_\_\_\_ SOURCE \_\_\_\_\_

### ASSETS

### FINANCIAL NETWORKTH

### LIABILITIES

WHO DO YOU BANK WITH	_____	BALANCE	PAYMENT
\$\$ SAVINGS IN THE BANK	\$ _____	BANK LOANS	\$ _____
REAL ESTATE (PRESENT VALUE)	\$ _____	MORTGAGES	\$ _____
ORIGINAL PURCHASE PRICE	\$ _____	ORIG. MTG \$ _____ RATE _____ MATURING _____	
MUTUAL FUNDS/STOCKS/BONDS	\$ _____	CREDIT CARD	\$ _____
RRSP'S	\$ _____	CREDIT CARD	\$ _____
AUTOMOBILE	\$ _____	OTHER LOANS	\$ _____
YEAR _____ MAKE _____		LINE OF CREDIT	\$ _____
OTHER ASSETS	\$ _____		
<b>TOTAL ASSETS</b>	<b>\$ _____</b>	<b>TOTAL LIABILITIES</b>	<b>\$ _____</b>

**Purpose:** (Please provide a brief explanation)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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## PROPERTY DESCRIPTION (FOR EXISTING PROPERTY OR NEW PROPERTY BEING PURCHASED)

MUNICIPAL ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_

POSTAL CODE \_\_\_\_\_ LEGAL DESCRIPTION \_\_\_\_\_ GARAGE \_\_\_\_\_

SQ. FEET \_\_\_\_\_ CONDO FEES \$ \_\_\_\_\_ PROPERTY TAXES \$ \_\_\_\_\_ CLOSING DATE \_\_\_\_\_

## DETAILS OF NEW MORTGAGE REQUIRED

PURCHASE PRICE \$ \_\_\_\_\_ DOWN PAYMENT \$ \_\_\_\_\_ MORTGAGE NEEDED \$ \_\_\_\_\_

SOURCE OF DOWNPAYMENT: Please circle RRSP/GIC GIFT CASH SAVINGS OTHER \_\_\_\_\_

**REFERRED BY:** \_\_\_\_\_

**APPLICANT:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**CO-APPLICANT:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

I/We warrant and confirm that the information given in the mortgage application 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.