



**Broker Financial Group**

**APPLICANT:**

Name (First/Init./Last): \_\_\_\_\_  
 Male  Female Birth Date: (M/D/Y) \_\_\_\_\_  
 S.I.N.: \_\_\_\_\_  
 Marital Status: \_\_\_\_\_ # Dependants: \_\_\_\_\_  
 Home Tel: \_\_\_\_\_ Bus. Tel: \_\_\_\_\_ ext. Cell: \_\_\_\_\_  
 E-mail: \_\_\_\_\_  
 Address (3 Years History): \_\_\_\_\_  
 \_\_\_\_\_  
 City: \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Time lived at current address: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.  
 Status (please circle): OWN RENT Amount: \_\_\_\_\_  
 Previous Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Years Lived There: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.

**EMPLOYMENT ( 3 Years History ) :**

Name of Employer: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Job Title: \_\_\_\_\_ Industry: \_\_\_\_\_  
 Annual Income: Salary or Hourly (circle one) \$ \_\_\_\_\_  
 Commission & Others \$ \_\_\_\_\_  
 Length of Employment: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.  
 In Current Line of Business: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.  
 Previous Employer: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Job Title: \_\_\_\_\_ Industry: \_\_\_\_\_  
 Annual Income: \$ \_\_\_\_\_  
 Length of Employment: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.

**CO-APPLICANT:**

Name (First/Init./Last): \_\_\_\_\_  
 Male  Female Birth Date: (M/D/Y) \_\_\_\_\_  
 S.I.N.: \_\_\_\_\_  
 Marital Status: \_\_\_\_\_ # Dependants: \_\_\_\_\_  
 Home Tel: \_\_\_\_\_ Bus. Tel: \_\_\_\_\_ ext. Cell: \_\_\_\_\_  
 E-mail: \_\_\_\_\_  
 Address (3 Years History): \_\_\_\_\_  
 \_\_\_\_\_  
 City: \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Time lived at current address: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.  
 Status (please circle): OWN RENT Amount: \_\_\_\_\_  
 Previous Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Years Lived There: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.

**EMPLOYMENT ( 3 Years History ) :**

Name of Employer: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Job Title: \_\_\_\_\_ Industry: \_\_\_\_\_  
 Annual Income: Salary or Hourly (circle one) \$ \_\_\_\_\_  
 Commission & Others \$ \_\_\_\_\_  
 Length of Employment: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.  
 In Current Line of Business: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.  
 Previous Employer: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Job Title: \_\_\_\_\_ Industry: \_\_\_\_\_  
 Annual Income: \$ \_\_\_\_\_  
 Length of Employment: \_\_\_\_\_ Yrs. \_\_\_\_\_ Mths.

**ASSETS / LIABILITIES:**

Asset Type	Asset Value	Liability Type	Financial Institution	Liability Bal.	Mthly Pymt.
Cash	\$ _____	Bank Loans	_____	\$ _____	\$ _____
Stock and Bonds	_____	Mortgage, Residential	_____	_____	_____
Real Estate, Residential	_____	Mortgage, Others	_____	_____	_____
Real Estate, Others	_____	Credit Card	_____	_____	_____
RRSP	_____	Credit Card	_____	_____	_____
GIC	_____	Credit Card	_____	_____	_____
Automobile	_____	Credit Card	_____	_____	_____
		Line of Credit	_____	_____	_____
		Line of Credit	_____	_____	_____

**PROPERTY INFORMATION:**

Address: \_\_\_\_\_ City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

**Property Type:**  Detached  Semi-Detached  Row Housing  Duplex-Detached  Apartment  Mobile Home

**Dwelling Style:**  One Storey  Bi-level  Two Storey  Split Level  Storey and a half  Three Storey

Lot Size: \_\_\_\_\_ sq.ft. Livable Area: \_\_\_\_\_ sq.ft. Building Age: \_\_\_\_\_

**Garage Size:**  Single  Double  Triple  None **Garage Style:**  Attached  Detached  N/A

Annual Property Tax: \$ \_\_\_\_\_ Monthly Maintenance: \$ \_\_\_\_\_

**MORTGAGE INFORMATION:**

Purpose of Loan:  Pre-Approval  Purchase  Transfer/Switch  Refinance/Equity Take Out

Purchase/Current Value: \$ \_\_\_\_\_ Mortgage Amount Required: \$ \_\_\_\_\_ Closing Date: \_\_\_\_\_

**GENERAL INFORMATION:**

	YES	NO
Are there any suits or judgments against you or pending against you?	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever gone through bankruptcy	<input type="checkbox"/>	<input type="checkbox"/>
Are any of your assets pledged or in any other manner unavailable for payment of your debts?	<input type="checkbox"/>	<input type="checkbox"/> Are
any of your assets presently involved in a marriage or separation agreement?	<input type="checkbox"/>	<input type="checkbox"/>
Are you the endorser or guarantor of anyone else's debt?	<input type="checkbox"/>	<input type="checkbox"/>
Are you the endorser or guarantor of any leases or contracts?	<input type="checkbox"/>	<input type="checkbox"/>

**NOTES:**

I warrant and confirm that the info given in the mortgage application is true and correct and I/We understand that it is being used to determine my/our credit responsibility and to evaluate and respond to my/our request for mortgage financing. You are authorized to obtain any info you may require for these purposes from other sources (including, for example, credit bureau) and each source is hereby authorized to provide you with such information. I/We also understand, acknowledge and agree that the info given in the application form as well as other info you obtain in relation to my credit history may be disclosed to potential lenders, mortgage insurers or other service providers required in relation to this application and any other parties with whom I/We propose to have a financial relationship. I/We further acknowledge and agree that each potential mortgage lender, mortgage insurer or service provider to whom you provide the mortgage application and/or my/our personal info is permitted to receive such application and info and maintain records relating to me/us and my/our mortgage application and to hold, use, communicate and disclose personal info about me/us, including my Social Insurance Number(SIN) if I/We provide it, and collect personal info from me/us, you and from third persons, including credit bureaux, credit reporting and collection agencies, financial institutions, my/our past and present employments, creditors and tenants, my/our spouse or any other person who has info about me/us for the purpose recording, evaluating and responding to my/our application for mortgage financing or related activities and I/We specifically consent to the release and disclosure of personal info by such persons to and among each potential mortgage lender, mortgage insurer or other service provider.

Your privacy is important. We are committed to respecting and protecting your privacy and security. We have implemented measures to protect the privacy & security of your personal information through strict policies and practices in compliance with applicable Federal and Provincial privacy legislation. Please contact us to discuss our privacy & security policies and practices.

\_\_\_\_\_  
SIGNATURE OF APPLICANT

\_\_\_\_\_  
SIGNATURE OF CO-APPLICANT

DATE \_\_\_\_\_

DATE \_\_\_\_\_

**Broker Financial Group**

**FAX COVER SHEET**

**NOTE: Income confirmation required for immediate processing**

**Attn: George Bargis**

**Direct Line: 416-885-7453**

**Direct Fax: 1 855-853-8622**

**From:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**VERY IMPORTANT: How did you hear about our office?**

\_\_\_\_\_

**Number of Pages (including this one) \_\_\_\_\_**

**Fax Includes:**

- Fully completed & signed Application
- Income confirmation for all applicants (\*REQUIRED)  
Employment Letter confirming length of employment and salary along with current pay stub or last 3 years Notice of Assessments and T1 Generals if self employed
- Down payment confirmation  
Documentation required as to source of down payment - last 3 months bank statements if from bank account, current investment statements (i.e. RRSP, GIC's, etc), Sale agreement if coming from sale of property, etc.
- Copy of the Purchase and Sale Agreement with MLS listing for new property
- Existing Mortgage Statement – (if existing mortgage exists)
- Other - is there something special we should know about your mortgage needs or financial goals so that we can better prepare for the mortgage consultation?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

