

4. Assets and Liabilities

Cash/Savings:

Cash/Savings Amount: \$ _____
 Chequing Amount \$ _____
 Term Deposits (GICs) \$ _____
 Cash Value of Life Insurance: \$ _____
 Other (): \$ _____
 Other (): \$ _____
 Other (): \$ _____

Total Assets Cash/Savings: \$ _____

Autos/Boats/RVs:

Year/Type/Make: _____
 Value: \$ _____
 Year/Type/Make: _____
 Value: \$ _____
 Year/Type/Make: _____
 Value: \$ _____

Total Assets Autos/Boats/RVs: \$ _____

Real Estate:

Address Street _____ City _____
 Dollar Value: \$ _____
 Address Street _____ City _____
 Dollar Value: \$ _____
 Address Street _____ City _____
 Dollar Value: \$ _____

Total Assets Real Estate: \$ _____

Other Assets:

Household Goods: \$ _____
 Stocks and Bonds: \$ _____
 Mutual Funds (RRSP): \$ _____
 Mutual Funds (non-RRSP): \$ _____
 Other Mutual Funds (RRSP): \$ _____
 Other Mutual Funds (non-RRSP): \$ _____
 Other (): \$ _____
 Other (): \$ _____

Total Assets 'Other': \$ _____

Total Assets 'All': \$ _____

Credit Cards/Personal Loans:

1. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 2. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 3. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 4. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 5. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No

Total Liabilities Credit Cards/Personal Loans: \$ _____

Autos/Boats/RVs:

1. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 2. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 3. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No

Total Liabilities Autos/Boats/RVs: \$ _____

Mortgages:

1st 2nd Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 1st 2nd Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 1st 2nd Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No

Total Liabilities Mortgages: \$ _____

Other Liabilities:

1. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 2. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 3. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 4. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No
 5. Type: _____ Institution: _____
 Monthly Payment: \$ _____ Balance Outstanding: \$ _____ Payout? Yes No

Total Liabilities 'Other': \$ _____

Total Liabilities 'All': \$ _____

Net Worth: \$ _____

OFFICE USE ONLY

5. Mortgage Purchase Information (complete only if mortgage purpose is purchase)

Closing Date (MM/DD/YYYY) Waiver Date (MM/DD/ YYYY) Other Date (MM/DD/YYYY) Description of Other Date: _____

Purchase Price: \$ _____

Down Payment: \$ _____

Amount Applied For: \$ _____

Other Financing: \$ _____ Details: _____
(if applicable)

Source of Down Payment (i.e. Cash, RSP, GIC, Gift)	Details (i.e. institution)	Amount
1.		\$
2.		\$
3.		\$

6. Subject Property Details (typically found on Purchase Agreement or MLS Listing)

Address Street _____

City _____ Province _____ Postal Code _____

\$ _____ Includes Heat?: Yes No
Condo Fees (if applicable) _____

Legal Description _____

\$ _____ Property Tax (current annual amount) _____ Lot Size _____

Location: Urban Rural

Year Built _____ Square Footage _____

Property Condition: Excellent Good Fair

Sewer: Municipal Septic
 Holding Tank Other

Pool: Yes No

Building Type: Bungalow Split Level Two Storey
 Three Storey Other

Basement: Finished Unfinished None

Insulation Type: UFFI Other

Environmental Issue: No
 Yes If yes, specify _____

Garage: Attached Detached No. of cars _____

Water: Municipal Well
 Community Well Other

Paved Road: Yes No

External Construction: Vinyl Brick
 Stucco Other

Zoning: Residential Commercial Other

Tenure: Freehold Leasehold
 Condo Other

Heating Type: Forced Air Gas Forced Air Electric
 Forced Air Oil Electric Baseboard

7. Information On Current Residence Owned By Applicants

Address Street _____

City _____ Province _____ Postal Code _____

\$ _____ Includes Heat?: Yes No
Condo Fees (if applicable) _____

Legal Description _____

\$ _____ Property Tax (current annual amount) _____ Lot Size _____

Location: Urban Rural

Year Built _____ Square Footage _____

Property Condition: Excellent Good Fair

Sewer: Municipal Septic
 Holding Tank Other

Pool: Yes No

Building Type: Bungalow Split Level Two Storey
 Three Storey Other

Basement: Finished Unfinished None
 Other

Insulation Type: UFFI Other

Environmental Issue: No
 Yes If yes, specify _____

Garage: Attached Detached No. of cars _____

Water: Municipal Well
 Community Well Other

Paved Road: Yes No

External Construction: Vinyl Brick
 Stucco Other

Zoning: Residential Commercial Other

Tenure: Freehold Leasehold
 Condo Other

Heating Type: Forced Air Gas Forced Air Electric
 Forced Air Oil Electric Baseboard

Mortgage Information:

Current Mortgage Holder: _____ Mortgage #: _____ Rate Type: _____ Payment Ammount: _____

Original Mortgage Amount: _____ Maturity Date: _____ Term Type: _____ Payment Frequency: _____

Current Mortgage Balance: _____ Payoff: No Prior To Advance From Proceeds Loan Type: Mortgage Secured LOC

8. Notes: (for any general comments and additional information you would like to provide)

Mortgage Purpose Notes: _____

Other Notes: _____

9. Certification and Signatures

I hereby certify that the information contained in this application is true and complete to the best of my knowledge and belief.

I hereby authorize the person or firm to whom this application is submitted to obtain such credit reports or other information as may be deemed necessary to my application for a mortgage. This consent is given pursuant to Section 12 of the Personal Information Reporting Act. S.B.C., 1973.

X

Borrower's Signature

X

Co-Borrower's Signature

Borrower (Print Name)

Co-Borrower (Print Name)

Dated (MM/DD/YYYY)

Dated (MM/DD/YYYY)

List Of Required Documents

- 1. Current Job Letter Stating the following:
 - Applicants Name
 - Start Date
 - Position
 - Salary
 - Name & Phone number and title/position of person writing the letter
- 2. Current Pay Stub
- 3. Last Two Years Notice Of Assessments
- 4. Void Cheque
- 5. Down Payment & Confirmation
 - If down payment is from own resources we will require three months bank statements to confirm
 - If down payment is a gift from an immediate family member we will require a gift letter
- 6. Copy of Purchase Agreement including all schedules, amendments and waivers
- 7. MLS Feature Sheet with picture of the property
- 8. Lawyer/Notary information

We may require additional documents & information