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|--|--|--|------------------------------------|--|--|
| Purpose of Loan: | | <input type="checkbox"/> Purchase | <input type="checkbox"/> Refinance | <input type="checkbox"/> Renewal | <input type="checkbox"/> Equity Take-Out |
| Applicant | | | Co-Applicant | | |
| Name: | | | | | |
| Address: | | | | | |
| City / Province: | | | | | |
| Postal Code: | | How Long _____ Yrs | | How Long _____ Yrs | |
| Home Phone: | | | | | |
| Previous Address: (If less than 3 years) | | | | | |
| Email Address: | | | | | |
| Date of Birth: | | | | | |
| Marital Status: | | # of Dependents: _____ | | # of Dependents: _____ | |
| Social Ins Number: | | | | | |
| Relationship: | | | | | |
| Employer: | | | | | |
| Location: | | | | | |
| Bus Tel Number: | | Ext: | | Ext: | |
| Years of Service: | | _____ Yrs | | _____ Yrs | |
| | | <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Self Employed | | <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Self Employed | |
| Occupation: | | | | | |
| Annual Income: | | \$ _____ salaried / commission | | \$ _____ salaried / commission | |
| Details: <small>hourly rate, normal hours worked per week, base salary, salary plus commission, self-employed or part time income</small> | | Income Verification <input type="checkbox"/> Employment Letter <input type="checkbox"/> Pay Stubs <input type="checkbox"/> T4 Slip <input type="checkbox"/> 2 Years NOA | | Income Verification <input type="checkbox"/> Employment Letter <input type="checkbox"/> Pay Stubs <input type="checkbox"/> T4 Slip <input type="checkbox"/> 2 Years NOA | |
| Previous Employer: Occupation / Years: | | | | | |
| Property to be Financed | | <input type="checkbox"/> Purchase Price <input type="checkbox"/> Current Market Value | | \$ _____ | |
| | | Principal Residence | | Y / N | |
| Street Address | | City | | Prov. Postal Code | |
| Legal Description (lot & plan #) | | Annual Taxes | | Condo Fee | |
| | | \$ _____ | | \$ _____ | |
| Lot Size ft / m _____ X _____ | | Sq. Ft. Living | | Stories | |
| | | Property Type | | Baths | |
| Construction: <input type="checkbox"/> Brick <input type="checkbox"/> Frame <input type="checkbox"/> Siding | | Age | | Bedrooms | |
| | | Garage <input type="checkbox"/> Det <input type="checkbox"/> Att | | # Cars | |
| Listed on MLS Y / N | | Rental Y / N | | Monthly Rental Income | |
| | | \$ _____ | | Details of Rental Income (lease/etc.) | |
| Contact for Inspection: | | Name | | Telephone | |

| Assets | | | | Liabilities | | | |
|---|------|---|-------|---|-----|---|---------|
| Real Estate: Address | | Value: | | Mortgages: Lender | | Balance | Payment |
| | | \$ | | 1st | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| Automobiles: | | | | Financed / Leased: | | | |
| Yr | Make | Model | Value | Lender / Lease Company | | Balance | Payment |
| | | | | | | \$ | \$ |
| | | | | | | \$ | \$ |
| | | | | | | \$ | \$ |
| Cash in Bank / GICs: | | | | Loan / Line of Credit: | | | |
| Bank / Location | | Balance | | Lender | | Balance | Payment |
| | | \$ | | | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| Personal Effects / Other Assets | | | | | | | |
| Household Goods | | \$ | | | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| Life Insurance (Cash Surrender Value): | | | | Credit Cards: | | | |
| | | \$ | | | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| Stocks & Bonds: | | | | | | | |
| | | \$ | | | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| RRSPs: | | | | Other Debts: | | | |
| | | \$ | | | | \$ | \$ |
| | | \$ | | | | \$ | \$ |
| Down Payment Available: | | \$ | | Source of Funds: | | <input type="checkbox"/> Cash <input type="checkbox"/> Gift <input type="checkbox"/> Finance of Assets <input type="checkbox"/> RRSP <input type="checkbox"/> Sale of Property <input type="checkbox"/> Sweat Equity | |
| Comments: | | | | | | | |
| | | | | | | | |
| Refinance Details: | | | | | | | |
| Original Purchase Price: | | \$ | | Name of Builder: | | Date of Purchase: | |
| Down Payment: | | \$ | | CMHC or GE Insurance # | | | |
| Cash Back at Closing: | | \$ | | | | | |
| First Mortgage Information | | | | Second Mortgage Information | | | |
| 1 st Mortgage Amount: | | \$ | | 2 nd Mortgage Amount: | | \$ | |
| Rate: | % | Payment: | \$ | Rate: | % | Payment: | \$ |
| Term: | Yrs | <input type="checkbox"/> Month <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Week | | Term: | Yrs | <input type="checkbox"/> Month <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Week | |
| 1 st Mortgage Lender: Name & Address | | | | 2 nd Mortgage Lender: Name & Address | | | |
| Mtg. Due / Renewal Date: | | | | Mtg. Due / Renewal Date: | | | |
| Penalty for early discharge: | | \$ | | Penalty for early discharge: | | \$ | |
| Solicitor: | | Name | | Telephone | | Facsimile | |
| | | Street Address | | City | | Province Postal | |
| Notes: | | | | | | | |



| Client Consents for Privacy Protections and Other | | Kirsten Evans "My Independent Consultant" | |
|--|--|--|--|
| <p>I/We are clients of each of Mortgage Intelligence Inc. ("Mortgage Intelligence") and of My Independent Consultant for these purposes:</p> <ul style="list-style-type: none"> ➤ arranging and/or renewing loan(s) / mortgage(s) and maintaining my client relationship, and ➤ considering products approved by Mortgage Intelligence or its affiliates that may interest me/us. (client can delete this) <p>and I consent and agree that for these purposes:</p> <p>Mortgage Intelligence may use my personal information and may:</p> <ul style="list-style-type: none"> ➤ obtain personal information about me from consumer reporting agencies, credit bureaus, and real estate appraisers, and (if more than one client) about either of us from the other, and ➤ provide my personal information to third parties (e.g. lenders); <p>Each lender considering my applications from Mortgage Intelligence may:</p> <ul style="list-style-type: none"> ➤ obtain personal information about me from consumer reporting agencies, credit bureaus, and real estate appraisers, and (if more than one client) about either of us from the other, and ➤ ensure the accuracy of my personal information by contacting third parties; <p>continued in next column </p> | <p>Mortgage Intelligence and these lenders may:</p> <ul style="list-style-type: none"> ➤ retain my personal information for seven years after the last loan/mortgage application made on my behalf, or the end of the term of the loan/mortgage, whichever is later; <p>My Independent Consultant may:</p> <ul style="list-style-type: none"> ➤ retain and use my personal information for the purposes listed above for seven years after the last loan/mortgage application made on my/our behalf; <p>My Mortgage Intelligence File holding my personal information ("My File"):</p> <ul style="list-style-type: none"> ➤ is kept physically at the office of My Independent Consultant until a loan/mortgage is funded, after which it is sent to a Mortgage Intelligence corporate or licensed office for review and storage, and electronically on Mortgage Intelligence computer systems; and ➤ has access restricted to individuals having a need to deal with the File; <p>I can:</p> <ul style="list-style-type: none"> ➤ review and correct personal information in My File or held by My Independent Consultant; ➤ get Mortgage Intelligence's Privacy Policy from My Independent Consultant or at www.mortgageintelligence.ca <p>continued in next column </p> | <p>Other:</p> <ul style="list-style-type: none"> ➤ My Independent Consultant is not an employee of Mortgage Intelligence; ➤ I can obtain My Independent Consultant's Privacy Policy from My Independent Consultant; ➤ Mortgage Intelligence and My Independent Consultant may receive fees from each lender, and may receive a program fee from the lender which varies with the mortgage interest rate and terms accepted by me. Fees and program fees may be money, or goods and services having value to the recipient; ➤ Different lenders may provide Mortgage Intelligence and My Independent Consultant with different fees and incentives for similar products. A Lender's fees and incentives may also be dependent on amounts and types of business originated through Mortgage Intelligence and My Independent Consultant; and ➤ Each person signing below agrees that in this document "I", "me" and "my" refer to each of us. | |
| Other Terms: | | | |
| <ol style="list-style-type: none"> 1. Throughout this application, "I", "we", "us" and "our" refer to each applicant and co-applicant consenting below; "you" and "your" refer to Mortgage Intelligence Inc. 2. We certify that the information provided is true and accurate, that all our debts are current and in good standing, that we have no outstanding judgments, and that we have not declared bankruptcy in the last 6 years. 3. We acknowledge that you may be receiving a finder's fee from a lender in respect of arranging a mortgage/loan and we hereby waive any right to deny or dispute our receiving said fee. 4. We acknowledge that the evaluation, inspection and legal expenses incidental to this application will be paid by us. 5. We authorize you, and any financial institution to which you send our application, to obtain credit information from and share credit information with third parties, and to use our social insurance number(s) for such purposes. 6. We hereby acknowledge that we have been advised that mortgage life/creditor insurance may be available to us through a mortgage broker, lender or an insurance company and take sole responsibility to investigate and secure such coverage if desired. | | | |
| Applicant's Signature: | | Date: | |
| Co-Applicant's Signature: | | Date: | |