YOUR MORTGAGE **BROKER**

ADDRESS

E-MAIL

CUSTOMER **FIRST NAME**

CUSTOMER **LAST NAME**

CUSTOMER **PHONE #**

PLEASE COMPLETE THIS FORM ON **ADOBE READER** . CLICK HERE TO **GET IT FOR FREE** NOW.

MORTGAGE APPLICATION

Applicants should complete this form as "Applicant 1" or "Applicant 2", as applicable. Applicant 2 information must also be provided (and the appropriate box checked) when a) the income or assets of a person other than the "Applicant 1" (including Applicant 1's spouse) will be used as a basis for loan qualification or b) the income or assets of the Applicant 1's spouse will not be used as a basis for loan qualification, but his or her liabilities must be considered because the Applicant 1 resides in a community property state, the security property is located in a community property state, or the Applicant 1 is relying on other property located in a community property state as a basis for repayment of the mortgage.

MORTGAGE INFORMATION

*Items marked with * or in red are required.*

Mortgage Details

* Purpose of Loan
☐ *Purchase*
☐ *Pre-Approval*
☐ *Refinance*
☐ *Switch*

Mortgage Amount Required $

Approx Date Funds Required

(MM/DD/YYYY)

Preferred Mortgage Options

Please select all that apply
☐ *Low rates at origination*
☐ *Low rates at renewal*
☐ *Flexible payment plans*
☐ *Flexible prepayment options*
☐ *Access to Credit Life Insurance*

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NEXT: APPLICANT 1 INFORMATION

APPLICANT 1 INFORMATION

Identification

Title _____

* First Name _____

* Last Name _____

Initial _____

* Date of Birth _____ (MM/DD/YYYY)

SIN # _____

Home Phone # _____

Work Phone # _____

MobilePhone # _____

E-mail Address _____

Current Living Address

Residential Status ☐ Own   ☐ Rent   ☐ Live with parents   ☐ Other

Monthly Rent Payments $ _____

Number _____

Street Name _____

Street Type _____

Street Direction _____

Unit _____

City/Town _____

Province _____

Postal Code _____

Time at Residence _____ YY _____ MM

Previous Living Address   (If Time at Residence is less than 3 years in current living address)

Residential Status ☐ Own   ☐ Rent   ☐ Live with parents   ☐ Other

Monthly Rent Payments $ _____

Number _____

Street Name _____

Street Type _____

Street Direction _____

Unit _____

City/Town _____

Province _____

Postal Code _____

APPLICANT 1 INFORMATION

*Items marked with * or in red are required.*

Present Employer

Occupation Type

Industry Sector

Name of Employer

Length of Employment _____ (YYMM Ex. 3 yrs 2 months = 0302)

Years in Line of Business _____ (YYMM Ex. 3 yrs 2 months = 0302)

Number

Street Name

Street Type

Street Direction

Unit

City/Town

Province

Postal Code

Income

Type of Income

Annual Income $

Other Income Source

Other Annual Income $

Past Employer   (If Length of Employment is less than 3 years at present employer)

Occupation Type

Industry Sector

Name of Employer

Length of Employment _____ (YYMM Ex. 3 yrs 2 months = 0302)

Years in Line of Business _____ (YYMM Ex. 3 yrs 2 months = 0302)

Number

Street Name

Street Type

Street Direction

Unit

City/Town

Province

Postal Code

Income

Type of Income

Annual Income $

Other Income Source

Other Annual Income $

APPLICANT 2 INFORMATION

Identification

Title	____
First Name	_____
Last Name	_____
Initial	____

Date of Birth	_____ (MM/DD/YYYY)
SIN #	_____
Home Phone #	_____
Work Phone #	_____
Mobile Phone #	_____
E-mail Address	_____

Current Living Address   Same as Applicant 1

Residential Status   ☐ Own   ☐ Rent
                     ☐ Live with parents   ☐ Other

Monthly Rent Payments $ _____

Number	_____
Street Name	_____
Street Type	_____
Street Direction	_____
Unit	_____
City/Town	_____
Province	_____
Postal Code	_____
Time at Residence	YY _____ MM _____

Previous Living Address   (If Time at Residence is less than 3 years in current living address)   Same as Applicant 1

Residential Status   ☐ Own   ☐ Rent
                     ☐ Live with parents   ☐ Other

Monthly Rent Payments $ _____

Number	_____
Street Name	_____
Street Type	_____
Street Direction	_____
Unit	_____
City/Town	_____
Province	_____
Postal Code	_____

APPLICANT 2 INFORMATION

Present Employer

Occupation Type

Industry Sector

Name of Employer

Length of Employment   (YYMM Ex. 3 yrs 2 months = 0302)

Years in Line of Business   (YYMM Ex. 3 yrs 2 months = 0302)

Number

Street Name

Street Type

Street Direction

Unit

City/Town

Province

Postal Code

Income

Type of Income

Annual Income $

Other Income Source

Other Annual Income $

Past Employer   (If Length of Employment is less than 3 years at present employer)

Occupation Type

Industry Sector

Name of Employer

Length of Employment   (YYMM Ex. 3 yrs 2 months = 0302)

Years in Line of Business   (YYMM Ex. 3 yrs 2 months = 0302)

Number

Street Name

Street Type

Street Direction

Unit

City/Town

Province

Postal Code

Income

Type of Income

Annual Income $

Other Income Source

Other Annual Income $

SUBJECT PROPERTY INFORMATION

Property Value / Address

Purchase Price	$	Number	
MLS Listing Number		Street Name	
		Street Type	
		Street Direction	
Current Home Value	$	Unit	
For Refinance		City/Town	
		Province	
		Postal Code	

Same as Applicant 1's Address ☐

Expense Details

Monthly Taxes	$	Monthly Condo Fee $	
Tax Year			

NEXT: FINANCIAL INFORMATION

FINANCIAL INFORMATION

*Items marked with * or in red are required.*

Assets

Type	Where / Financial Institution(s)	Amount / Value
Cash in Bank / Saving		$
RRSP		$
Gift		$
Vehicle		$
Stocks, bonds, Mutual funds, etc		$
Other Assets		$
Household Goods		$
Life Insurance		$
Deposit on purchased		$

Liabilities

Type	Where / Financial Institution(s)	Balance Owing	Monthly Payment
Credit Cards		$	
Bank/Personal Loans		$	$
Automobile Loan		$	$
Alimony		$	$
Child Support		$	$
Student Loan		$	$
Wage Garnishment		$	$
Other Liabilities		$	$
Unsecured Line of Credit		$	
Income Tax		$	$
Secured Line of Credit		$	
Lease		$	$
Auto Lease		$	$

NET WORTH = **TOTAL ASSETS** − **TOTAL LIABILITIES**

$ = $ − $

NEXT: REVIEW

Note to Broker

ACKNOWLEDGEMENT AND AGREEMENT

☐ I hereby agree to all terms in the above agreement and: (a) certify that the information given in my application is complete and correct, (b) consent to this agreement being exchanged by email and other electronic means, which may be less secure than mail, (c) consent that this electronic agreement shall be deemed as valid as a paper contract, and (d) consent that my printed name below shall act as my signature.

I agree to receive electronic messages containing news and updates relevant to me and/or the mortgage industry. I understand my consent can be withdrawn at any time.

Applicant 2 (if applicable) :

I hereby agree to all terms in the above agreement and: (a) certify that the information given in my application is complete and correct, (b) consent to this agreement being exchanged by email and other electronic means, which may be less secure than mail, (c) consent that this electronic agreement shall be deemed as valid as a paper contract, and (d) consent that my printed name below shall act as my signature.
(Only required if there is an Applicant 2)

I agree to receive electronic messages containing news and updates relevant to me and/or the mortgage industry. I understand my consent can be withdrawn at any time.

_____ (MM/DD/YYYY)   _____ (MM/DD/YYYY)
Applicant 1's Signature   Date   Applicant 2's Signature   Date
(Your typed name is your signature)   *(Your typed name is your signature)*

END OF THE APPLICATION

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