



YOUR MORTGAGE **BROKER** _____

 LICENSE # _____
 PHONE # _____
 ADDRESS _____

 WEB SITE _____
 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 * 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



NEXT: APPLICANT 1 INFORMATION

APPLICANT 1 INFORMATION

Items marked with * are required.

Identification

Title	_____	Date of Birth	_____	(MM/DD/YYYY)
* First Name	_____	SIN #	_____	
* Last Name	_____	Home Phone #	_____	
Initial	_____	Work Phone #	_____	
		MobilePhone #	_____	
		E-mail Address	_____	

Current Living Address

Residential Status	<input type="checkbox"/> Own	<input type="checkbox"/> Rent	Number	_____
	<input type="checkbox"/> Live with parents	<input type="checkbox"/> Other	Street Name	_____
Monthly Rent Payments	\$	_____	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	<input type="checkbox"/> Own	<input type="checkbox"/> Rent	Number	_____
	<input type="checkbox"/> Live with parents	<input type="checkbox"/> Other	Street Name	_____
Monthly Rent Payments	\$	_____	Street Type	_____
			Street Direction	_____
			Unit	_____
			City/Town	_____
			Province	_____
			Postal Code	_____

NEXT: APPLICANT 1 INFORMATION

APPLICANT 1 INFORMATION

Items marked with * are required.

Present Employer

Occupation Type	_____	Number	_____
Industry Sector	_____	Street Name	_____
Name of Employer	_____	Street Type	_____
Length of Employment	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Street Direction	_____
Years in Line of Business	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Unit	_____
		City/Town	_____
		Province	_____
		Postal Code	_____

Income

Type of Income	_____	Other Income Source	_____
Annual Income	\$ _____	Other Annual Income	\$ _____

Past Employer

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

Occupation Type	_____	Number	_____
Industry Sector	_____	Street Name	_____
Name of Employer	_____	Street Type	_____
Length of Employment	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Street Direction	_____
Years in Line of Business	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Unit	_____
		City/Town	_____
		Province	_____
		Postal Code	_____

Income

Type of Income	_____	Other Income Source	_____
Annual Income	\$ _____	Other Annual Income	\$ _____

NEXT: APPLICANT 2 INFORMATION

APPLICANT 2 INFORMATION

Items marked with * are required.

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

Items marked with * are required.

Present Employer

Occupation Type	_____	Number	_____
Industry Sector	_____	Street Name	_____
Name of Employer	_____	Street Type	_____
Length of Employment	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Street Direction	_____
Years in Line of Business	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Unit	_____
		City/Town	_____
		Province	_____
		Postal Code	_____

Income

Type of Income	_____	Other Income Source	_____
Annual Income	\$ _____	Other Annual Income	\$ _____

Past Employer

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

Occupation Type	_____	Number	_____
Industry Sector	_____	Street Name	_____
Name of Employer	_____	Street Type	_____
Length of Employment	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Street Direction	_____
Years in Line of Business	_____ (YYMM Ex. 3 yrs 2 months = 0302)	Unit	_____
		City/Town	_____
		Province	_____
		Postal Code	_____

Income

Type of Income	_____	Other Income Source	_____
Annual Income	\$ _____	Other Annual Income	\$ _____

NEXT: SUBJECT PROPERTY INFORMATION

SUBJECT PROPERTY INFORMATION

Items marked with * are required.

Property Value / Address

Purchase Price \$ _____
MLS Listing Number _____

Current Home Value \$ _____
For Refinance

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

Same as Applicant 1's Address

Expense Details

Monthly Taxes \$ _____
Tax Year _____

Monthly Condo Fee \$ _____

NEXT: FINANCIAL INFORMATION

FINANCIAL INFORMATION

Items marked with * 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 Owning	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		\$	\$

$$\text{NET WORTH} = \text{TOTAL ASSETS} - \text{TOTAL LIABILITIES}$$

\$ = \$ - \$

NEXT: REVIEW

