



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



NEXT: APPLICANT 1 INFORMATION

APPLICANT 1 INFORMATION

Items marked with * or in red are required.

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

Income

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

APPLICANT 2 INFORMATION

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

Present Employer

Occupation Type

Industry Sector

Name of Employer

Length of Employment

Years in Line of Business

(YYMM Ex. 3 yrs 2 months = 0302)

(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

Years in Line of Business

(YYMM Ex. 3 yrs 2 months = 0302)

(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

\$

NEXT: SUBJECT PROPERTY INFORMATION

SUBJECT PROPERTY INFORMATION

Items marked with * or in red 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 \$

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 Owng	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

REVIEW

Items marked with * or in red are required.

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.

Applicant 1's Signature
(Your typed name is your signature)

Date (MM/DD/YYYY)

Applicant 2's Signature
(Your typed name is your signature)

Date (MM/DD/YYYY)

END OF THE APPLICATION

