

Name(s): \_\_\_\_\_

Date Faxed: \_\_\_\_\_

To help you “get moving,” and start you down to road of a simple, fast and stress-free solution to all of your home financing needs, please provide all the info that is marked in the “To Do” column as soon as possible.

To Do Done

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Completed Credit Application for all applicants |
| <input type="checkbox"/> | <input type="checkbox"/> | Signed Credit Authorization                     |

**Confirmation of Employment and Income**

- If you are a Salaried Employee please provide:
- A Current Pay Statement dated within the past 30 days **AND**
  - A Letter of Employment from your manager of HR dept indicating your: start date, position, salary **OR**
  - Contact name and number in order to verbally verify employment
- If you are Self Employed, receive commission or bonuses please provide:
- 2 Years of your Notice of Assessment (T451)  
(The blue form that is mailed back to you after you file your taxes from CRA) **AND**
  - At least 1 BFS document (Please ask your advisor for clarification)
  - 2 Years of your Company's Financial Statements
- If you are a part-time employee, please provide
- 2 Years of T4's **OR**
  - 2 Years of NOA's **OR**
  - 2 Years of T1 Generals
- If you receive rental income, please provide:
- A Rental Tenancy Agreement

**Down Payment Confirmation**

- In order to confirm your down payment, please provide the following:
- A Bank Account Statement [90 day reporting period]
  - A statement of your investments [90 day reporting period]
  - A RRSP Statement [90 day reporting period]
  - A Gift letter
  - Sale Agreement of existing property

**Refinance (An Increase to your existing mortgage amount)**

- Please provide the following most recent documents for:
- Property Assessment
  - Property Tax Statement with confirmation of being paid by either a bank stamp or copy of the cheque provided
  - Home Insurance
  - Mortgage Statement confirming current balance
  - Mortgage Discharge Request signed

**Solicitor Information**

If you have a preferred solicitor, please fill out the information on the right.

Firm Name: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

**Origin Insurance**

Origin offers insurance products to protect your mortgage. In the event that the holder is critically ill or passes on, the policy will pay out sufficiently to cover the mortgage. Our policies are highly competitive and can give you much better peace of mind.

In order to “get you moving fast,” please provide the information as quickly as possible. Should you have any questions or concerns about the information you are being asked to provide, please do not hesitate to contact me. When all your documents are complete, please fax to the number below.



**NATHAN ISHERWOOD**  
604-250-8375

**ClientFirst**  
MORTGAGE • SOLUTIONS

**STEVE D'SOUZA**  
604-837-3185

**CLIENTFIRSTMORTGAGES.COM** **ORIGIN**