|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Please complete this form by writing or typing in your responses. Once completed, please email the completed form to Steve Tallo at [steve@truststevetallo.com](mailto:steve@truststevetallo.com) . If you have any questions, please call Steve @ (289) 314-8786. | | | **Purpose of Mortgage**  Purchase primary residence  Purchase rental property  Re-finance  Switch/Transfer from other lender | | |
| Personal Information | | | | | |
| **Applicant** | | | **Co-applicant** (if applicable) | | |
| Title -  Mr.  Mrs.  Miss  Ms. | | | Title -  Mr.  Mrs.  Miss  Ms. | | |
| First Name | Middle Name | Last Name | | | First Name | Middle Name | Last Name | | |
| Date of Birth – MM/DD/YYYY: | | | Date of Birth – MM/DD/YYYY: | | |
| Social Insurance #: | | | Social Insurance #: | | |
| Marital Status: | | | Marital Status: | | |
| Smoker or Non-smoker: | | | Smoker or Non-smoker: | | |
| Contact Information | | | | | |
| Home Phone #: | | | Home Phone #: | | |
| Cell Phone #: | | | Cell Phone #: | | |
| Work Phone #: | | | Work Phone #: | | |
| Email: | | | Email: | | |
| Employment Information | | | | | |
| Occupation: | | | Occupation: | | |
| Industry: | | | Industry: | | |
| Employer: | | | Employer: | | |
| Address: | | | Address: | | |
| City: | | | City: | | |
| Province: | PC: | | Province: | | PC: |
| Status (Full-Time/Part-time) |  | | Status (Full-Time/Part-time) | |  |
| Annual Income: | | | Annual Income: | | |
| Years/Months at Current Job: | | | Years/Months at Current Job: | | |
| Years/Months in Current Industry: | | | Years/Months in Current Industry: | | |
| **If less than 3 years at the above employment position, please complete the following:** | | | | | |
| Previous Occupation: | | | Previous Occupation: | | |
| Industry: | | | Industry: | | |
| Employer: | | | Employer: | | |
| Address: | | | Address: | | |
| City: | | | City: | | |
| Province: | PC: | | Province: | | PC: |
| Annual Income: | | | Annual Income: | | |
| Years/Months at this Job: | | | Years/Months at this Job: | | |
| Type of Income:  Salary/Hourly  Commission  Pension  Alimony  Other | | | Type of Income:  Salary/Hourly  Commission  Pension  Alimony  Other | | |
| Current Primary Residence | | | | | |
| Address (include Apt # if applicable): | | | Address (include Apt # if applicable): | | |
| City: | | | City: | | |
| Province: | PC: | | Province: | | PC: |
| Years/Months Lived at this address: | | | Years/Months Lived at this address: | | |
| If renting, rent per month: | | | If renting, rent per month: | | |
| **If less than three years at the above address, please complete the following:** | | | | | |
| Previous Address (include Apt # if applicable): | | | Previous Address (include Apt # if applicable): | | |
| City: | | | City: | | |
| Province: | PC: | | Province: | | PC: |
| Years/Months Lived at this address: | | | Years/Months Lived at this address: | | |
| Assets (Note: Liabilities will show on the credit report) | | | | | |
| **Type** | | **Financial Institution(s)** | | **Amount (S)** | |
| Cash in Bank | |  | |  | |
| Deposit on property being purchased (if applicable) | |  | |  | |
| Automobile: present value | |  | |  | |
| Value of Present Home (if owned): | |  | |  | |
| Investment/Vacation Properties | |  | |  | |
| Stocks, Bonds, Mutual Funds, etc. | |  | |  | |
| RRSP’s | |  | |  | |
| Other Assets | |  | |  | |
| **Total:** | |  | |  | |
| Subject Property Purchase | | | | | |
| **Please Complete if Purchasing a Property** | | | | | |
| Property Address (include Apt # if applicable): | | | | | |
| City: | | Province: | | PC: | |
| Purchase Price: | | | Closing Date: | | |
| Down payment (% or $): | | | Down payment source: | | |
| **Please select all that apply to describe the property’s features:** | | | | | |
| Type of Residence:  Detached  Semi-detached  Townhouse  Condo - Fee per month: | | | | | |
| Garage:  Double  Single | | Sq. Footage: | | Age: | |
| Re-financing/Switch | | | | | |
| **Please Complete if Re-financing or Switching to Another Lender (Mortgage for your existing property)** | | | | | |
| Original Purchase Date: | | Mortgage Holder: | | Original Purchase Price: | |
| Original Mortgage Amount: | | Payment Amount: | | Property Taxes: | |
| Current Mortgage Maturity Date: | | | Payment Frequency (i.e. Mthly) | | |
| Current Mortgage Term: | | | Current Mortgage Interest Rate | | |
| Current Mortgage Amount: | | | Market Value: | | |
| **Please select all that apply to describe the property’s features:** | | | | | |
| Type of Residence:  Detached  Semi-detached  Townhouse  Condo - Fee per month: | | | | | |
| Garage:  Double  Single | | | | | |
| Client Consent | | | | | |
| I/we warrant and confirm that the information given in this mortgage application form is true and correct and I/we understand that it is being used to determine my/our credit responsibility and to evaluate and respond to my/our request for mortgage financing. You are authorized to obtain any information you may require for these purposes from other sources (including, for example, credit bureaus) and each source is hereby authorized to provide you with such information. I/we also understand, acknowledge and agree that the information given in the mortgage application form as well as other information you obtain in relation our my/our credit history may be disclosed to potential mortgage lenders, mortgage insurers, other service providers, organizations providing technological or other support services required in relation to this application and any other parties with whom I/we propose to have a financial relationship.  I/we further acknowledge and agree that each potential mortgage lender, mortgage insurer or service provider to whom you provide the mortgage application and/or my/our personal information is permitted to receive such application and information and maintain records relating to me/us and my/our mortgage application and to hold, use, communicate and disclose personal information about me/use and my/our mortgage application and to hold, use, communicate and disclose personal information about me/use, including my/our Social Insurance Number (SIN) if I/we provide it, and collect personal information from me/us, you and from third persons, including credit bureaus, credit reporting and collection agencies, financial institutions, my/our past and present employers, creditors and tenants, my/our spouse or any other person who has information about me/us for the purposes of recording, evaluating and responding to my/our application for mortgage financing or related activities and I/we specifically consent to the release and disclosure of personal information by such persons to and among you and each potential mortgage lender, mortgage insurer or other service provider. | | | | | |
| Client Consent Signatures | | | | | |
| **Applicant** | | | **Co-applicant** (if applicable) | | |
| Name: | | | Name: | | |
| Date: | | | Date: | | |
| Signature: | | | Signature: | | |