

Mortgage Application

Mortgage Alternatives	
Brokerage # 12083 4 Cedar Pointe Drive, Unit Q Barrie, L4N 5R7 289.697.7000	Broker/Agent
	License #
	Supervisor
	Cell

Principal Applicant				Co- Applicant			
Salutation				Salutation			
First Name				First Name			
Middle Name				Middle Name			
Last Name				Last Name			
DOB (MM/DD/YY)		SIN		DOB (MM/DD/YY)		SIN	
Marital Status		Dependants		Marital Status		Dependants	
Phone Work				Phone Work			
Phone Home				Phone Home			
Cell				Cell			
E-mail				Email			
FTHB				FTHB			
Current Address				Same Address			
Current Address				Current Address			
City		Province		City		Province	
Postal Code		Status		Postal Code		Status	
Yrs&Mths There		\$ Rent		Yrs&Mths There		\$ Rent	
If Less than 3-years				Same Address			
Previous Address				Previous Address			
City				City			
Province		Postal Code		Province		Postal Code	
Yrs&Mths There		\$ Rent		Yrs&Mths There		\$ Rent	

Employment – Principal Applicant				Employment – Co- Applicant			
Current Employer				Current Employer			
Address				Address			
City		Province		City		Province	
Postal Code		Phone		Postal Code		Phone	
Employment Type		Title		Employment Type		Title	
Income Type		Income/Yr		Income Type		Income/Yr	
Time in Job		Yr in Industry		Time in Job		Yr in Industry	
If less than 3-years				If less than 3-years			
Previous Employer				Previous Employer			
Address				Address			
City		Province		City		Province	
Postal Code		Phone		Postal Code		Phone	
Employment Type		Title		Employment Type		Title	
Income Type		Income/Yr		Income Type		Income/Yr	
Time in Job		Yr in Industry		Time in Job		Yr in Industry	

Other Income	Description			Income Period	Income	
Assets	Description	Balance		Assets	Description	Balance
Liabilities	Balance	Payments		Liabilities	Balance	Payment

Property Owned (1)				Property Owned (2)			
Address / City				Address / City			
Purchase Date (MM/DD/YY)		Price		Purchase Date (MM/DD/YY)		Price	
Mortgage Balance		Monthly Payment		Mortgage Balance		Monthly Payment	
Maturity Date (MM/DD/YY)		Interest Rate		Maturity Date (MM/DD/YY)		Interest Rate	
Rental Income		Property Tax		Rental Income		Property Tax	
Rental Expense		Condo Fees		Rental Expense		Condo Fees	
Lender		EST. Value		Lender		EST. Value	

Subject Property							
Address				City			
Province				Postal Code			
Lot				Block			
MLS		Constr. Type		Tenure		# of Unit	
Style		Type		Age of home			
Living Space		Lot Size		Garage Size		Garage Type	
Heat		Water Info		Env. Hazzard		Sewage Info	
Annual Taxes		Paid By		Heating			
Property Value		Condo Fees		Heating Include?		Rental Inc.	

Application Type		Purpose	
Closing Date		Financing Waiving	
Down Payment		Source of DP	
Improvements		Improvement Value	
First Payment Date		Payment Frequency	

Notes

Realtor _____

Office _____

Mortgage Alternatives**Client Consent Form****Mortgage Number :****Client Agreement**

The undersigned applicant(s) (we or us, whether there is a single applicant of more than one) covenant and agree with (Name – broker) licensed with mortgage alternatives. as follows:

- a) that all information we provide to you in connection with any mortgage application or other service you provide (a transaction) will be true and correct, and we acknowledge that you and any lenders or other persons to whom you submit that information will be relying on it in order to consider our application and/or determine our creditworthiness;
- b) that we hereby authorize you to obtain any further financial or other information you may require concerning us in connection with a transaction from any sources to which you may apply and each such source is hereby authorized to provide you with such information;
- c) that we hereby authorize you to disclose to any lender, credit bureau, insurer, insurance agent or other person involved in a transaction such personal and financial information concerning us as you consider appropriate and we consent to the retention by those persons;
- d) that we acknowledge and agree to your privacy policy, which we have been afforded an opportunity to review, and we hereby consent to receiving email and other electronic communication from you;
- e) that we hereby release you from all claims in damages or otherwise that we may have in connection with or arising from any use, disclosure or release of any of our personal information, and that we will indemnify you against and save you harmless from any and all claims in damages or otherwise which may be made by any third party in connection with or arising from any personal or other information that we have provided to you;
- f) that we will pay all legal, property appraisal, registration fee and other costs or expenses incurred by you in connection with a transaction;
- g) that you may retain our application and other personal information whether or not any transaction is ultimately completed;
- h) that we acknowledge and agree that you may be entitled to receive financial compensation with respect to a transaction from a lender or other person; and
- i) that we may in our discretion make application for life, disability and/or critical illness insurance coverage in connection with a transaction, and that we have no claim against you if we elect not to do so. I/we understand that the terms and conditions of qualifying for coverage under such insurance are determined by the insurer, and that no such insurance will be in place unless and until I/we are so notified by the insurer (see mortgage insurance quote for details).
- j) That we give permission to you, your service providers, insurers, insurance agents/brokers and affiliates including but not limited to Unitas Insurance Services Limited, to contact me on an ongoing basis to consider products or services that may be of interest to me.

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, 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 bureau, 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 purpose 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.

Referral Source Fees

I/we acknowledge and I/we consent that there may be payment by you of a referral fee, where applicable, based on a fixed percentage of the principal amount of my mortgage to the referral source including, but not limited to, real estate brokerage, builder, developer, financial planning organization or insurance brokerage.

Co-Brokered

I/we acknowledge and I/we consent that our application may be co-brokered with another Mortgage Brokerage in order to secure a Mortgage.

CLIENT CONSENT

Name	Signature	Date (MM/DD/YY)
1.		
2.		
3.		
Mortgage Alternatives, License # 12083 4 Cedar Pointe Drive, Unit Q, Barrie, L4N 5R7 289.697.7000 (Ref: MA1707)		Broker/Agent
		License