



Mortgage Intake Form

Property Address: _____

Full Name(s) Registered on Title	Date of Birth (dd/mm/yyyy)	Occupation/ Employer name, address and phone number

Spousal Status (check applicable box)

- Single Legally Married Common Law Separated pursuant to a Separation Agreement
 Other _____

If married, are both spouses on title? Yes No

If not, name of spouse not on title: _____

Do you occupy the property as your principal family residence? Yes No

If no, please provide your address for service: _____

Are municipal taxes paid up to date? Yes No

Please call your local municipality to obtain a property tax statement of account by email.

Please provide the reference information for any mortgages to be paid out on closing (company name, mortgage reference number.)

Fire insurance will need to be updated to reflect the new lender. Please provide the contact information for your insurance agent or broker. (Name, company name, phone number, policy number.)

Are there any other payments to be made by the firm on closing? If yes, please provide a list as well as recent statements showing the current balance due as well as the full account number. (Credit cards, collection accounts, etc.)

Do you have an existing will? Yes No