



DOCUMENT CHECKLIST

For your next appointment, please bring the following documents based on your desired transaction type.

	Transaction Type		
	Purchase	Transfer	Equity Takeout
Confirmation of Employment <ul style="list-style-type: none"> Letter from employer Most recent pay stubs 3 years of tax returns and Notice of Assessments (if self employed) 	✓	✓	✓
Certificate of Title		✓	✓
Property Tax Assessment From City / Town <ul style="list-style-type: none"> Current Tax Receipt showing taxes paid / TIPPS Program 		✓	✓
Fire Insurance <ul style="list-style-type: none"> Name of insurance carrier 		✓	✓
Pre-authorized Payment Information <ul style="list-style-type: none"> Void Cheque 	✓	✓	✓
Most Recent Mortgage Renewal Offer <p>From present institution or a current mortgage statement to show amount owing on current residence for proof of down payment (if applicable)</p>	✓	✓	✓
Surveyor's Certificate		✓	✓
Copy of Present Registered Mortgage Document		✓	
Highlights Sheet / MLS Listing <ul style="list-style-type: none"> Highlight sheet on home, or copy of the real estate MLS listing 	✓		
Agreement of Purchase and Sale and Counter Offers	✓		
Lawyer Information <ul style="list-style-type: none"> Name of Firm Lawyer's name Address Telephone and Fax numbers 	✓		✓
Statement indicating source of down payment <ul style="list-style-type: none"> Bonds, Mutual Funds, RRSP's Gift letter and proof of gift deposit Three months of bank statements 	✓		
Social Insurance Number Card	✓	✓	✓
Driver's Licence	✓	✓	✓
Privacy Policy	✓	✓	✓
Mortgage Authorization Form	✓	✓	✓

Please Note:

- Appraisal costs for equity takeouts and refinances are the client's responsibility and the mortgage consultants will order them for you.
- Appraisal costs for Transfers may be picked up by the lending institution (some conditions apply). The mortgage consultant will order them for you

Additional Requirements
