

Category	Document	1st Mortgage / Purchase	2 nd Mortgage / Private Mortgage	Alternative Mortgage	Refinance / Renewals / Transfers	Secured Loans	Reverse Mortgage
Mortgage Application	Signed Mortgage Application	✓	✓	✓	✓	✓	✓
	Credit Check Consent	✓	✓	✓	✓	✓	✓
	<ul style="list-style-type: none"> 1 Government issued Photo ID (no Health Card) 1 Other ID (e.g., SIN, Credit Card, PR Card) 	✓	✓	✓	✓	✓	✓
Income	If Employed: <ul style="list-style-type: none"> Recent Employment Letter Recent Paystubs (last two pay periods) 	✓	✓	✓	✓		✓
	If Self-Employed: <ul style="list-style-type: none"> Articles of Incorporation / Business License or GST/HST Number Business Bank Statements (last six months) 	✓	✓	✓	✓		✓
	Notice of Assessment (NOA) and T1 General (last two years)	✓	✓	✓	✓		✓
	T4 (last two years)	✓	✓	✓	✓		✓
	Documentation supporting Pension, Disability, Child Support, Alimony or other Secondary Sources of Income	✓	✓	✓	✓		✓
Subject Property	Purchase Agreement	✓	✓	✓			
	MLS Listing	✓	✓	✓			

Category	Document	1st Mortgage / Purchase	2 nd Mortgage / Private Mortgage	Alternative Mortgage	Refinance / Renewals / Transfers	Secured Loans	Reverse Mortgage
	Home Appraisal – From Lender’s Authorized Appraiser	✓					
	Recent Mortgage Statement						
	Recent Property Tax Bill						
	Home Insurance Policy	✓	✓	✓	✓		✓
Mortgage Commitment	Signed Mortgage Commitment	✓	✓	✓	✓	✓	✓
	Mortgage Insurance Application / Waiver	✓	✓	✓	✓		
	Signed Mortgage Borrower Disclosure	✓	✓	✓	✓	✓	✓
	Void Cheque	✓	✓	✓	✓	✓	✓
Down Payment	Proof of Down Payment in the Form of Bank Statements (3 months prior to closing)	✓		✓			
	Proof of Proceeds from Sale of Existing Property (Firm Sale Agreement)	✓		✓			
	Gift Letter with Associated Bank Statement	✓		✓			
	Recent Mortgage Statements						

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Other Properties / Investments	Recent Property Tax Bill						
	Lease Agreement						
Legal	Solicitor Information: <ul style="list-style-type: none"> • Firm and Solicitor Name • Address • Phone • Fax • Email 	✓	✓	✓	✓		✓