



INSTRUCTION: Please e-mail completed application & 1 photo ID to **Add your email address**

Application for Mortgage Financing

Contact information

IMPORTANT: ALL FIELDS MUST BE COMPLETED IN BLOCK LETTERS

Applicant				Co-Applicant			
FIRST NAME		LAST NAME		FIRST NAME		LAST NAME	
CURRENT ADDRESS		OWNED: ☐	RENTING: ☐	CURRENT ADDRESS		OWNED: ☐	RENTING: ☐
		SINCE: _____				SINCE: _____	
CITY	PROVINCE	POSTAL CODE		CITY	PROVINCE	POSTAL CODE	
PREVIOUS ADDRESS (IF LESS THAN 3 YEARS AT CURRENT ADDRESS)				PREVIOUS ADDRESS (IF LESS THAN 3 YEARS AT CURRENT ADDRESS)			
CITY	PROVINCE	POSTAL CODE	RENT/OWN: _____ SINCE: _____	CITY	PROVINCE	POSTAL CODE	RENT/OWN: _____ SINCE: _____
HOME PHONE		BUSINESS PHONE		HOME PHONE		BUSINESS PHONE	
EMAIL ADDRESS				EMAIL ADDRESS			
DATE OF BIRTH		SOCIAL INS. NUMBER	MARITAL STATUS	DATE OF BIRTH		SOCIAL INS. NUMBER	MARITAL STATUS
NO. OF DEPENDENTS: _____		FIRST-TIME HOMEBUYER? ☐		NO. OF DEPENDENTS: _____		FIRST-TIME HOMEBUYER? ☐	

Credit information

IMPORTANT: Proofs of income required with submission. For salaried applicants: Previous 2-year T4s, Notices of Assessment, T1 Generals & latest 2 paylips. For self-employed applicants: Business registration, 2-year T1s and T2s and 1-year business bank statements.

Applicant				Co-Applicant			
CURRENT EMPLOYER				CURRENT EMPLOYER			
ADDRESS				ADDRESS			
CITY	PROVINCE	POSTAL CODE		CITY	PROVINCE	POSTAL CODE	
OCCUPATION		# OF YEARS EMPLOYED		OCCUPATION		# OF YEARS EMPLOYED	
ANNUAL INCOME		SALARY/ HOURLY		ANNUAL INCOME		SALARY/ HOURLY	
PREVIOUS EMPLOYER & ADDRESS (IF LESS THAN 3 YEARS)				PREVIOUS EMPLOYER & ADDRESS (IF LESS THAN 3 YEARS)			
OCCUPATION		# OF YEARS EMPLOYED		OCCUPATION		# OF YEARS EMPLOYED	
ANNUAL INCOME		SALARY/ HOURLY		ANNUAL INCOME		SALARY/ HOURLY	

Financial information

IMPORTANT: MINIMUM THREE (3) - YEAR EMPLOYMENT HISTORY IS REQUIRED

ASSETS	Name of Financial Institution	Amount/Value
Cash in bank		\$
Real estate (value)		\$
Automobile (value)		\$
RRSPs		\$
Stocks/Bonds		\$
Other assets		\$
Real Estate deposit		\$

LIABILITIES	Name of Financial Institution	Balance Owning	Monthly Payment
Bank Loans		\$	\$
First Mortgage		\$	\$
Second Mortgage		\$	\$
Credit Card		\$	\$
Credit Card		\$	\$
Credit Card		\$	\$
Line of Credit		\$	\$

Requested Mortgage Amount: \$ _____

Purchase Price or Current Value: \$ _____

Downpayment Amount: \$ _____

Closing Date: _____

New Property Information

IMPORTANT:

1. If **PURCHASING**, please submit the MLS listing and Agreement of Purchase and Sale.
2. If **REFINANCING**, please submit recent mortgage statements and final property tax bill.

ADDRESS _____

LOT SIZE _____ BLOCK/PLAN _____ BUILDING TYPE _____ EXTERIOR _____

FREEHOLD OR CONDO _____ OCCUPANCY _____

ANNUAL TAXES \$ _____ CONDO FEES \$ _____

BASEMENT: ☐ FINISHED ☐ UNFINISHED GARAGE: ☐ YES ☐ NO SWIMMING POOL: ☐ YES ☐ NO FIREPLACE: ☐ YES ☐ NO SQUARE FOOTAGE _____

YEAR BUILT _____ TOTAL ROOMS _____ BEDROOMS _____ FULL BATHS _____ ½ BATHS _____

Client Application Authorization and Consent:

We, Secure Mortgage Experts, Inc., independently owned and operated, collect, receive, use and disclose personal information about you, our client, for the purposes of: verifying the information provided; assessing your credit-worthiness; maintaining our client relationship; presenting your mortgage application to various lenders and insurers for the purpose of securing and/or renewing a mortgage and/or related service and providing information to you about other products offered or approved by us, our affiliates, related entities or other third party financial partners that we believe may be of interest to you ("marketing purposes"). We may also disclose your personal information under strict confidentiality restrictions to (i) any potential purchaser of our business and their advisors, (ii) any third party service providers to whom we may outsource our business functions and (iii) any parties involved in the securitization, assignment or pledge of loan (s)/mortgage (s) that are obtained through us.

By signing this form (or giving your verbal consent or clicking in the box appearing below), you consent to our collecting, using and disclosing your personal information for the foregoing purposes, and to carry out these purposes you agree that we may disclose your personal information to and receive your personal information from: consumer reporting agencies, credit bureaus, real estate appraisers, your bank(s) or other financial institutions with whom you have or have had dealings, your past mortgage brokers, your present and past employers and such other third parties who may have information about your financial status. If there are more than one applicant, you also agree that we may collect, use and disclose personal information about each of you from the other for the purposes listed above.

If you do not agree that we may collect, use or disclose your personal information for the Marketing Purposes, please initial the box where indicated [or indicate your refusal verbally or click in the box appearing below]. If you do not initial this box [or signify your refusal as described], we will assume that you consent to our collection, use and/or disclosure of your personal information for marketing purposes.

☐ NO, you may not collect, use or disclose my personal information for any marketing purposes.



Date:

Signature Applicant



Date:

Signature Co-Applicant