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Mortgage application worksheet

Fill in what you know before your call with Ezra. Blanks are fine. This is a worksheet, not a credit application: it doesn't authorize a credit check, and your formal application is signed separately through Mortgage Architects' secure online application.

Private: please don't email this form. Bring it to your call, or ask Ezra for a secure way to send it.

1. The plan

- ☐ Buying a home
- ☐ Switching lenders
- ☐ Building or renovating
- ☐ Renewing my mortgage
- ☐ Refinancing
- ☐ Not sure yet

Property address (if you have one) | City

Purchase price or today's value | Down payment you plan to use | Closing or renewal date

Property type (house, condo, townhouse...) | Annual property tax | Monthly condo fee | Monthly heating cost

Where the down payment comes from:

- ☐ Savings
- ☐ FHSA
- ☐ Sale of a property
- ☐ RRSP (Home Buyers' Plan)
- ☐ Gift from family
- ☐ Other

2. About you: applicant

Full legal name | Date of birth (YYYY-MM-DD)

Phone | Email

Current address | Years there

Own or rent? | Monthly rent or mortgage payment | Marital status | Dependants

Previous address, if under 3 years at the current one | Years there

Work and income

Employer | Position | Start date

Type of work:

- ☐ Salaried, full-time
- ☐ Self-employed
- ☐ Commission or bonus
- ☐ Hourly or part-time
- ☐ Contract or seasonal
- ☐ Retired or pension

Gross annual income | Other income (rental, support, pension...) | Amount per year

Previous employer, if under 3 years at the current one | Position | Years there

3. About you: co-applicant (if any)

Full legal name | Date of birth (YYYY-MM-DD)

Phone | Email

Current address | Years there

Own or rent? | Monthly rent or mortgage payment | Marital status | Dependants

Previous address, if under 3 years at the current one | Years there

Work and income

Employer | Position | Start date

Type of work:

- ☐ Salaried, full-time
- ☐ Self-employed
- ☐ Commission or bonus
- ☐ Hourly or part-time
- ☐ Contract or seasonal
- ☐ Retired or pension

Gross annual income | Other income (rental, support, pension...) | Amount per year

Previous employer, if under 3 years at the current one | Position | Years there

4. What you own

Rough figures are fine. Your lender will want recent statements later.

WHAT	WHERE IT'S HELD	VALUE TODAY
Chequing and savings		
RRSP		
FHSA		
TFSA		
Other investments		
Vehicles		
Other property		

5. What you owe

Include anything with a monthly payment, even if it's paid in full each month.

WHAT	LENDER	BALANCE	MONTHLY PAYMENT
Credit cards			
Lines of credit			
Car loan or lease			
Student loans			
Child or spousal support			
Other mortgages			

6. Anything else Ezra should know

A job change coming up, a past bankruptcy, a property you rent out, a question you'd like answered first...