KAPOOR LAW FIRM
PROFESSIONAL CORPORATION

K

5805 Whittle Road, Unit 212
Mississauga, Ontario L4Z 2J1
☎: 905-890-4999
☎: 905-890-3999 (Fax)
✉: info@kapoorlaw.ca

✉: Manish Kapoor, Lawyer: mk@kapoorlaw.ca ✉: Shilpa Bodalia, Lawyer: sb@kapoorlaw.ca ✉: Amandeep Thind, Law Clerk: at@kapoorlaw.ca

CLIENT INTAKE FORM (PURCHASE)

1. Full Name(s) of all Purchaser(s): ………………………………..…………………………………

………………………………………..…………………………………

2. Contact (Phone *and* Email): ………………………………..…………………………………

………………………………………..…………………………………

3. Date of Birth for the Purchaser(s): …………………………..…………………………………

4. Spousal status for the Purchaser(s): …………………………..…………………………………

5. Residency Status for the Vendor(s): …………………………..…………………………………
(Canadian Citizen, Permanent Resident or Non-Resident)

6. How to take title: …………………………………………………………………………..
(Registered Owner, Joint Tenants, or Tenants in Common with % per person)

> *There are several options as to how title to the property may be recorded. Where more than one person's name is to be recorded on title, choices include "Joint Tenancy" and "Tenancy -in-Common". If you choose joint tenancy, in the event of the death of one of the joint tenants, the survivor(s) will own the entire property by right of survivorship. For a married or partnered couple, this is the most convenient way to deal with a house when one of the spouses or partners dies. If you choose tenancy-in-common, then upon the death of one co-owner, that person's interest will pass to his or her beneficiary under his or her will or in accordance with intestacy legislation if there is no will.*

7. Ministry of Finance required information (select all that are applicable in your transaction):

Whether you were physically present in Canada for 183 days out of the 12-month period prior to the date of closing:

☐ Yes
☐ No

☐ I/We intend to occupy the property as our primary place of residence;
☐ I/We intend to lease the property, and this is our investment property; OR
☐ Other (please specify): ………………………………………………………………………..

Type of property (select all that apply):

☐ Single Family Residence
☐ Multi-Unit Dwelling
☐ Commerical
☐ Agricultural Farmland
☐ Vacant Land

☐ Waterfront
☐ Mixed Use (please specify): ………………………………………………………………..

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- ☐ Detached
- ☐ Semi-Detached
- ☐ Condominium
- ☐ Condominium Townhome
- ☐ Freehold Townhome
- ☐ Other (please specify): …………………………………………………………………………..

Please note that if the property is occupied as a multi-unit residence, then we may require additional coverage from the title insurance company and you may require to order searches on the subject property like Compliance, Fire Order and Zoning searches. Please notify us as soon as possible if this is the case.

8. Whether the Purchaser(s) is/are First Time Homebuyer: ..…………………………………………………..
The Land Transfer Tax Act defines a "purchaser" as an individual who is at least 18 years of age and who has never owned an eligible home anywhere in the world and whose spouse has not owned an eligible home anywhere in the world while he or she was a spouse of the individual.

9. Details of Mortgage and Agent: …………………………………..…………………………………

10. How were you referred to our office:……………………………..…………………………………

CHECKLIST

A. Insurance: Contact your home insurance provider to obtain coverage. We will require confirmation prior to closing. Do note that lenders may have specific requirements for the policy.

B. Identification: Two (2) pieces of government-issued identification for each person (front and back, in colour) in accordance with Law Society of Ontario and Lender requirements. One of the IDs must be a Permanent Resident Card or Canadian Passport. Please note that a *Health Card is not acceptable*.

C. Void Cheque or Direct Deposit Form: Advise the names of all account holders, along with instructions for disbursement of any proceeds from the transaction.

D. Signing: Documents may be signed in person or electronically. If virtual signing is permitted for this transaction, you may choose to either sign documents in-person or electronically. If documents are signed electronically, please note that a secondary ID verification process is mandatory and additional fees will apply. If documents must be signed in person, our address is 5805 Whittle Road, Suite 212, Mississauga, Ontario L4Z 2J1. Free parking is available.

E. Tax/Utilities: Contact utility providers (i.e. hydro, water, gas, hot water tank rental, air conditioner, tax, etc) and notify them of the sale transaction. Cancel all pre-authorized payments with utility companies. Arrange the disconnection of any telephone, cable, or internet services. For condos, ensure that the property management is notified.

*** All information will be kept in the strictest of confidence. ***