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CLIENT INTAKE FORM (REFINANCE)

- 1. Full Name(s) of all Owner(s):
2. Contact (Phone and Email):
3. Date of Birth for the Owner(s):
4. Spousal status for the Owner(s):
5. Details of previous mortgage and/or mortgage number:
6. Property Tax Bill and Customer Number:
7. Details of debts to be paid or closed:
8. How were you referred to our office:

CHECKLIST

- A. Insurance: Contact your home insurance provider to change coverage regarding the new lender.
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.
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. 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.

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