



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

CLIENT INTAKE FORM (SALE)

- 1. Full Name(s) of all Vendor(s):
2. Contact (Phone and Email):
3. Date of Birth for the Vendor(s):
4. Spousal status for the Vendor(s):
5. Residency Status for the Vendor(s):
6. Details of existing mortgage and/or mortgage number:
7. Property Tax Bill and Customer Number:
8. Details of rental items associated with the property:
9. Address for service after closing:
10. Do you have a survey to the property:
11. How were you referred to our office:

CHECKLIST

- A. Insurance: Contact your home insurance provider to cancel or transfer coverage.
B. Identification: Two (2) pieces of government-issued identification for each person (front and back, in colour) in accordance with Law Society of Ontario requirements.



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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.

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.

F. Keys: Please arrange with you realtor and advise our office as to how keys are to be delivered to the new homeowners on closing.

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