



MORTGAGE APPLICATION

PRIMARY APPLICANT

Name (First/Init./Last): _____
 Address: _____
 City: _____ Prov: _____
 Postal Code: _____
 Date Of Birth (M/D/Y): _____
 S.I.N.: _____
 Home #: _____ Cell #: _____
 E-mail: _____
 Years at Current Address: _____ Months: _____

(If Less Than 3 Years)

Previous Address: _____ Yrs.: _____
 Male Female
 Marital Status (Single, Married, Divorced, etc): _____
 Current Residence: Rent Own Live w/ Parents | Other: _____
 Monthly Mortgage/Rent Payment: \$ _____

EMPLOYMENT

Current Employer/Company: _____
 Address: _____
 City: _____ Prov. _____ Postal Code: _____
 Work #: _____
 Job Title/Occupation: _____
 Industry Sector: _____
 Income Type: Salaried Commission Self-Employed Hourly
(If Self-Employed) Length: Yrs.: _____ Mths.: _____
 Annual Income: \$ _____
 Additional Income: _____ \$ _____
 Length Of Employment: Yrs.: _____ Mths.: _____

(If Current Employer Less Than 3 Years) Previous Employer/Company:
 Employer/Job Title/Occupation: _____
 Address: _____
 Annual Income: \$ _____
 Length Of Employment: Yrs.: _____ Mths.: _____

ASSETS

Savings/Chequing (List Bank/CU): _____
 Stocks/Bonds/Mutual Funds/RRSP (List Bank/CU): _____
 Vehicle (List Make/Model/Year): _____
 Other: _____

JOINT APPLICANT / GUARANTOR

Name (First/Init./Last): _____
 Address: _____
 City: _____ Prov: _____
 Postal Code: _____
 Date Of Birth (M/D/Y): _____
 S.I.N.: _____
 Home #: _____ Cell #: _____
 E-mail: _____
 Years at Current Address: _____ Months: _____

(If Less Than 3 Years)

Previous Address: _____ Yrs.: _____
 Male Female
 Marital Status (Single, Married, Divorced, etc): _____
 Current Residence: Rent Own Live w/ Parents | Other: _____
 Monthly Mortgage/Rent Payment: \$ _____

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 Address: _____
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ASSETS

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 Stocks/Bonds/Mutual Funds/RRSP (List Bank/CU): _____
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 Other: _____

Property Details	
Address	
City:	Prov.
Dwelling style:	Condo Fee: Property Tax:
Square Footage:	Occupancy: <input type="checkbox"/> Owner occupied <input type="checkbox"/> Rental

Purchase Details	
Purchase Price:	
Down Payment Amount:	
Closing Date:	
First Time Buyer:	Yes No
Down Payment Source:	<input type="checkbox"/> Personal Cash <input type="checkbox"/> Sale of Property <input type="checkbox"/> Gifted Down Pmt <input type="checkbox"/> Other Specify: _____

Refinance Details	
Original Purchase Price:	
Original Purchase Date:	
Est. Property Value:	
Current Mtg. Lender:	
Current Mtg. Balance:	
Current Interest Rate:	
Preferred Rate Type:	
New Mtg. Needed:	

Initials:

1-833-882-1881 (office)
1-833-883-1881 (fax)

www.chartered-finance.com

Contact@Chartered-Finance.com



Suitability

I/We are aware of:

- How a variable rate mortgage and its applicable mortgage payment may increase without notice within the term of the mortgage. This may affect the ability for me/us to make mortgage payments.
- How terminating or prepaying a mortgage prior to maturity may involve prepayment penalties. How different mortgage products can vary with various prepayment options.
- How changes in my/our employment (e.g., Reduced income), credit, liabilities, etc. may affect the ability to make mortgage payments in the future and changes prior to closing could affect I/us not qualifying for the mortgage.
- The monthly expense payment of (P/I&T) that I/we are comfortable paying is \$ _____; based on my/our current personal financial obligations (Include condo fees if applicable).
- The benefits of creditor mortgage protection, if permitted by provincial or territory applicable laws.
- The inherent risks associated with mortgage; the agent/broker has evaluated my/our needs to assist in determining the most appropriate mortgage including to offer to assist in preparing a budget.

Initials:

Consent and Privacy

Collection and Use of Personal Information

I/We understand that Centum Chartered Finance Inc. O/A Chartered Finance collects personal information in accordance with and for purposes detailed in its privacy policy available at www.chartered-finance.com ('Privacy Policy'), including to provide the services requested, better understand my/our financial needs and determine how Chartered Finance may be of service to me/us. The type of information collected, and related purposes include:

- Data such as name, address, contact numbers, email contact, income, employment, age, net worth, investment objectives, insurance coverage and banking information;
- Unique identifiers: such as social insurance, driver's license, passport numbers, etc. (as authorized by law); us to fulfill regulatory and other governmental obligations as well as to confirm and/or authenticate my/our identity.

Sharing of Personal Information:

I/We the undersigned understand that Chartered Finance may share my personal information as follows:

- Chartered Finance may share my/our personal information to credit bureau agencies, financial institutions, private investors, insurance companies, etc. to determine my/our eligibility for products and services.
- Chartered Finance may share my/our personal information to Authorized Agents or Affiliated Companies, as needed for the provision of services or products requested and/or as detailed in its Privacy Policy.
- Chartered Finance shall use my/our social insurance number as an aid to identify me/us with credit bureau agencies and financial institutions and for credit history file matching purposes.

Credit Bureau Consent:

I/We the undersigned, declare the information provided in the mortgage application is a true and complete representation. I/We understand that it is being used to determine my/our credit worthiness and to evaluate my/our request for credit. I/We authorize Chartered Finance or their designate to obtain a credit report.

Canada Anti-Spam Legislation:

I/We authorize Chartered Finance, affiliated companies and authorized agents to keep in touch with me/us via electronic messaging in order to provide me/us with content and provide insightful information, offers and services on mortgages, finances, etc. I/We wish to be kept informed and consent to the receiving of these informative electronic communications. I/We understand that I/we can withdraw consent at any time.

I/We understand that even if I/We do not provide my/our express consent to receive promotional communications, I/We may still be contacted, if authorized under applicable anti-spam legislation, for example if I/We have recently entered into a transaction with Chartered Finance (and therefore, Chartered Finance has my/our implied consent) as well as for transactional purposes such as contacts for customer service and/or product or service information, status updates or renewals, reminder notices or answers to my/our questions or inquiries.

Ongoing Commitment:

I/We acknowledge the Chartered Finance Privacy Policy is available for review at www.chartered-finance.com and understand that the collection, use and disclosure of my/our personal information by Chartered Finance will be done in accordance with such Privacy Policy.

I/We agree that a photocopy or electronic copy of this Mortgage Application, Suitability, Consent and Privacy Agreement has the same value as the original one.

I/We have read, understood, and reviewed the Suitability, Consent & Privacy sections.

Date: _____ Full Name: _____ Signature: _____

Date: _____ Full Name: _____ Signature: _____

[CLICK TO SAVE APPLICATION](#)

[CLICK TO PRINT APPLICATION](#)

1-833-882-1881 (office)
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www.chartered-finance.com

Contact@Chartered-Finance.com