

MORTGAGE APPLICATION

Branch Financial Inc. License # 12217

APPLICANT 1:		APPLICANT 2:	
Name: Address: City: Province: Postal Code: How Long: Telephone: Date of Birth: SIN #: Marital Status: Dependants:		Name: Address (If Diff.): City: Province: Postal Code: How Long: Telephone: Date of Birth: SIN #:	
Previous Address (If Less Than 2 Years) Address: City:		Previous Address (If Less Than 2 Years) Address: City:	
EMPLOYMENT INFO:		APPLICANT 2 EMPLOYMENT INFO:	
Company Name: Telephone: Position: Annual Income: Full/PT: Hourly/Salary: Hrs/Week: How Long: Previous Employer (If Less Than 2 Years) Company Name: Position: Annual income: How Long:		Company Name: Telephone: Position: Annual Income: Full/PT: Hourly/Salary: Hrs/Week: Previous Employer (If Less Than 2 Years) Company Name: Position: Annual Income: How long:	
<u>IF SELF EMPLOYED</u> Are you registered as: Do you have an active Business License: What is your 2 year NET DECLARED income average listed On line 150 of your Notice of Assessments:		<u>IF SELF EMPLOYED:</u> Are you registered as: Do you have an active Business License: What is your 2 year NET DECLARED income average listed On line 150 of your Notice of Assessments:	
CURRENT ASSETS:			
Who do you bank with:		Cash on Hand:	RRSP:
Value of your Vehicles:		Investments:	Other:
CURRENT RESIDENCE INFORMATION:			
Do you own or rent:		Current Rent/Mtg Payment:	
Current Mtg. Holder :		Property Value:	Mtg Bal:
Do you have a 2 nd Mortgage on this property:		2 nd Mortgage Bal:	2 nd Pymnt:
Do you own any additional properties:		(If YES – Please list in the Notes Section at the bottom)	
LIABILITIES:			
Credit Card Balances Total:		Monthly Credit Card Payments:	
Loan/LOC Balances Total:		Monthly Loan/LOC Payments:	
Are you planning on paying out any of this debt: (Please list amounts and the which debt to be repaid in the field below)			
Debts being paid:			
YOUR EMAIL ADDRESS:		YOUR REFERRING AGENT:	
Credit Information Release: You are providing written instructions consenting to us or our designee obtaining credit information from sources provided by the applicant(s), any credit reporting agency and credit grantor. We are compliant with current PIPEDA legislation. Any and all personal information will be held in strictest confidence and only released to third parties to fulfill our obligations to you or to comply with regulatory requirements or when required to do so by law. By signing, you certify the information in this form is accurate and current.			
Applicant 1 Signature		Date	Applicant 2 Signature

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<u>KNOW YOUR CLIENT INFORMATION</u>									
Branch Financial is dedicated to ensuring that we provide you with the right mortgage based on your needs and circumstances. To meet this objective and fulfill suitability requirements as dictated by law, we require the following information. We are dedicated to the protection of our clients and their information is considered private and confidential, and will only be used to meet the application objectives and as required by law.									
Applicant 1(FromPg1):		Applicant 2 (From Pg1):							
What are your goals with respect to this mortgage:	Purchase	Refinance	Switch Lenders						
What is you desired purchase price range:	From:		To:						
What down payment is available:		Source of the down payment:							
What mortgage payment range do you feel will fit your current lifestyle:	From:		To:						
Do you plan on moving in the next 5 years:	YES	NO	If YES, When:						
Do you plan on changing jobs in the next 5 years:	YES	NO	If YES, When:						
Do you plan on making any lump sum payments to pay down your mortgage faster:		YES	NO						
Do you think this home will meet your family's needs over the next 5 years:	YES		NO						
If NO, why not:									
Which is more important to you:	Debt Repayment: Paying off your mortgage as fast as possible Cash Flow: Having a low or the lowest payment possible								
Which is more important to you:	Mortgage Payment: Having a payment that fits your cash flow Interest Rate: Having a low or the lowest interest rate possible								
Would you prefer that your mortgage payments:	Stays the same from month to month Can increase or decrease if there is a potential to save money								
If given the option to have a variable interest rate that is lower than a fixed rate, would you:									
Be willing to watch interest rates on a monthly basis to ensure your mortgage has the best rate possible									
Prefer to have a fixed interest rate that did not change and did not require regular attention									
<u>Risk Tolerance Scale :</u> Please choose the number that best reflects your level of risk from the scale below									
1	2	3	4	5	6	7	8	9	10
LOW			MEDIUM				HIGH		
NOTES:									
<u>BRANCH FINANCIAL OFFICE</u>									
Identification Collected (Type and #)		(Select One of the following)							
		I have viewed the original							
		I have attached a legible copy							
		I have not physically met the client and cannot confirm their identity							
		I know the client personally and can attest to their identity							
DATE		BRANCH FINANCIAL AGENT SIGNATURE							