

# The Mortgage Duo

## APPLICANT 1

First. Middle. Last Name: \_\_\_\_\_

Cell: \_\_\_\_\_ Marital Status: \_\_\_\_\_  
Home: \_\_\_\_\_ Number of Dependents: \_\_\_\_\_  
SIN #: \_\_\_\_\_ Age of Dependents: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Current Bank: \_\_\_\_\_  
Email: \_\_\_\_\_

## ADDRESS & RESIDENTIAL STATUS

Rent  Own  Live with Parents  Other \_\_\_\_\_

Current Rent \$ \_\_\_\_\_ Previous Rent \$ \_\_\_\_\_

### CURRENT ADDRESS

### PREVIOUS ADDRESS (If current is less than 3yrs)

Mailing Address \_\_\_\_\_  
Physical Address \_\_\_\_\_  
City/Town \_\_\_\_\_  
Province \_\_\_\_\_  
Postal Code \_\_\_\_\_  
How Long \_\_\_\_\_

Mailing Address \_\_\_\_\_  
Physical Address \_\_\_\_\_  
City/Town \_\_\_\_\_  
Province \_\_\_\_\_  
Postal Code \_\_\_\_\_  
How Long \_\_\_\_\_

## EMPLOYMENT INFORMATION

### CURRENT EMPLOYER

### PREVIOUS EMPLOYER (If current is less than 3yrs)

**Employer** \_\_\_\_\_  
Position \_\_\_\_\_  
How long at job \_\_\_\_\_ Yrs.Mos.  
How long in industry \_\_\_\_\_ Yrs.Mos.  
Full Time or Part Time \_\_\_\_\_  
Annual Income \$ \_\_\_\_\_  
 Hourly  Salary  
\$ Per Hour \_\_\_\_\_  Commission  
Hours Per Week \_\_\_\_\_  Self- Employed

**Employer** \_\_\_\_\_  
Position \_\_\_\_\_  
How long at job \_\_\_\_\_ Yrs.Mos.  
How long in industry \_\_\_\_\_ Yrs.Mos.  
Full time or Part time \_\_\_\_\_  
Annual Income \$ \_\_\_\_\_  
 Hourly  Salary  
\$ Per Hour \_\_\_\_\_  Commission  
Hours Per Week \_\_\_\_\_  Self- Employed

Other Income \$ \_\_\_\_\_

Other Income \$ \_\_\_\_\_

Employer Address & Contact Info

Employer Address & Contact Info

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# The Mortgage Duo

## APPLICANT 2

First. Middle. Last Name: \_\_\_\_\_

Cell: \_\_\_\_\_ Marital Status: \_\_\_\_\_  
Home: \_\_\_\_\_ Number of Dependents: \_\_\_\_\_  
SIN #: \_\_\_\_\_ Age of Dependents: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Current Bank: \_\_\_\_\_  
Email: \_\_\_\_\_

## ADDRESS & RESIDENTIAL STATUS

SAME AS APPLICANT 1

Rent  Own  Live with Parents  Other \_\_\_\_\_

Current Rent \$ \_\_\_\_\_ Previous Rent \$ \_\_\_\_\_

### CURRENT ADDRESS

### PREVIOUS ADDRESS *(If current is less than 3yrs)*

Mailing Address \_\_\_\_\_  
Physical Address \_\_\_\_\_  
City/Town \_\_\_\_\_  
Province \_\_\_\_\_  
Postal Code \_\_\_\_\_  
How Long \_\_\_\_\_

Mailing Address \_\_\_\_\_  
Physical Address \_\_\_\_\_  
City/Town \_\_\_\_\_  
Province \_\_\_\_\_  
Postal Code \_\_\_\_\_  
How Long \_\_\_\_\_

## EMPLOYMENT INFORMATION

### CURRENT EMPLOYER

### PREVIOUS EMPLOYER *(If current is less than 3yrs)*

Employer \_\_\_\_\_  
Position \_\_\_\_\_  
How long at job \_\_\_\_\_ Yrs.Mos.  
How long in industry \_\_\_\_\_ Yrs.Mos.  
Full Time or Part Time \_\_\_\_\_  
Annual Income \$ \_\_\_\_\_  
 Hourly  Salary  
\$ Per Hour \_\_\_\_\_  Commission  
Hours Per Week \_\_\_\_\_  Self- Employed

Employer \_\_\_\_\_  
Position \_\_\_\_\_  
How long at job \_\_\_\_\_ Yrs.Mos.  
How long in industry \_\_\_\_\_ Yrs.Mos.  
Full time or Part time \_\_\_\_\_  
Annual Income \$ \_\_\_\_\_  
 Hourly  Salary  
\$ Per Hour \_\_\_\_\_  Commission  
Hours Per Week \_\_\_\_\_  Self- Employed

Other Income \$ \_\_\_\_\_

Other Income \$ \_\_\_\_\_

Employer Address & Contact Info

Employer Address & Contact Info

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# The Mortgage Duo

## ASSETS

TYPES	Description	Value
Real Estate		
Vehicles		
Personal Savings		
RRSP   TFSA   GIC		
Stocks   Bonds   Mutual Funds		
ATVs   Boats   Utility Trailer		
Holiday Trailer   RV		
Equipment		

## LIABILITIES

TYPES	Lender	Limit	Owing	Payment
Personal Loan				
Studen Loan or LOC				
Line of Credit (LOC)				
Credit Card				
Department Store Credit				
Auto Loan   Lease				
Child Support   Alimony				

## CURRENT HOME / MORTGAGE INFO

Lender _____	Rate / Term _____
Original Purchase Price _____	Balance Owing _____
Original Purchase Date _____	Renewal Date: _____
Mortgage Payment _____	Property Taxes: _____
Property Tax Portion of Payment _____	Heating \$: _____

# The Mortgage Duo

## Client Disclosure Statement

Borrower		Co-Borrower		
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Are there any suits or judgements against you or pending against you?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Have you ever gone through bankruptcy?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Have you ever had a Foreclosure on any property?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Are you currently a guarantor or co-signer of anyone's loan, lease, or contract?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Have you ever been divorced or separated from a spouse / common-law?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Do you pay or receive any Child Support or Alimony?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Are you a Canadian Citizen?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Are you a First Time Buyer?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Have you ever owned any property anywhere in the world?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Have you lived with a spouse or common-law who owned property in the past 4 years?
<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no	Have you lived in BC for at least the last 12 months?

**COMMENTS / NOTES**

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**SIGNATURE(S)**

_____		_____	
Borrower (Print name)		Co-Borrower (Print name)	
_____		_____	
Borrower (Signature)	Date	Co-Borrower (Signature)	Date

The above information is submitted to enable The Mortgage Duo to consider a mortgage loan, and is to the best of my/our knowledge and belief a true statement of my/our personal information.





### CLIENT CONSENT FORM

Mortgage Architects Inc. ("MA", "we", "us" and "our"), in accordance with our privacy policy and our obligations at law, may collect, receive, retain, use and disclose personal information about you, our client, for the purposes of: verification; assessing credit-worthiness; establishing credit limits; maintaining client relationships; presenting your mortgage application to various lenders and insurers and providing information to you about other products and services that may be of interest to you. We may also disclose your personal information to (i) any potential purchaser of our business and their advisors, (ii) any third party service providers to whom we may outsource our business functions and (iii) any parties involved in the securitization, assignment or pledge of a loan or mortgage that are obtained through us.

By signing this form, you are providing your acknowledgement and express consent to MA and our mortgage broker or agent:

1. to collect, use, retain and disclose your personal information for seven (7) years following the later of a) the date of your latest application with us, or b) the date on which your loans or mortgages we have arranged for you have expired or been terminated;
2. to inquire about and receive your personal information from: consumer reporting agencies, credit bureaus, real estate appraisers, your bank(s) or other financial institutions with whom you deal, your past mortgage brokers, your present and past employers and other third parties who may have information about your financial status;
3. that the approval or granting of any mortgage by a lender to you, as arranged by MA, is not to be construed or relied on by you as representing the value or condition of any underlying security or representing that you have the ability to repay the arranged mortgage debt;
4. to receive commercial electronic messages and other forms of business information, communications and marketing regarding products and services that may be of interest to you;
5. that MA and our mortgage broker or agent may receive fees or incentives from a lender for arranging a mortgage or loan for you. Fees and incentives include but are not limited to money, points or goods and services. Fees and incentives may vary between lenders for similar products and may also be dependent on the amounts and types of mortgage products originated.
6. that MA and our agent have not provided you with any investment advice or services and has advised you of the need for independent financial and tax planning advice from a qualified professional.

If you do not wish to receive any information or marketing from us regarding other products or services that may be of interest to you, please initial the box where indicated:

No, you may not send me any information on other products or services

A copy of our privacy policy and procedures is available on our website: [www.mtgarc.ca](http://www.mtgarc.ca). You may also contact our privacy compliance officer at 1-877-802-9100.

#### CLIENT EXPRESS CONSENT & ACKNOWLEDGEMENT:

*I hereby acknowledge the information disclosed above and provide my express consent,*

Print Client name 1: \_\_\_\_\_ Print Client name 2: \_\_\_\_\_

Signature Client 1: \_\_\_\_\_ Signature Client 2: \_\_\_\_\_

Date 1: \_\_\_\_\_ Date 2: \_\_\_\_\_