



## COMMERCIAL FINANCING – CLIENT CHECKLIST

We look forward to working with you and providing you with the best possible service and advice.

In order to complete your mortgage application, we will require a few items which are checked off below.

Please forward the selected documentation via e-mail, and feel free to contact us should you have any questions. Thank you!

### STANDARD MORTGAGE DOCUMENTS

- VINE Group Mortgage Application
- VINE Group Privacy Agreement
- Two pieces of government photo ID
- Void cheque (for mortgage payments)
- Solicitor contact details

### INCOME VERIFICATION

- Last two years corporate tax filings
- Last two years corporate Notice of Assessments (NOA)
- Last two years personal T1 General
- Last two year personal Notice of Assessments (NOA)
- Last two fiscal year business financials
- Articles of incorporation or business registration (if incorporated)
- Valid business license (if sole proprietor)

### OTHER

- Most recent rental lease agreements for all units
- Most recent mortgage statement for each property
- Purchase Agreement and full realtor package (including MLS listing, rent roll, operating statement of expenses, property taxes, heating, etc.)
- Environmental reports (Phase 1 or 2)
- Full commercial appraisal
- Down payment confirmation (90-day history of funds)

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