



NEW PURCHASE – CLIENT CHECKLIST

Congratulations on your new purchase! 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

- Mortgage Application
- Two pieces of government photo ID
- VINE Group Privacy Agreement
- Purchase Agreement with all updated waivers and conditions
- Realtor MLS Listing
- Void cheque (for mortgage payments)
- Solicitor contact details
- Last three months bank account/investment statements (confirm down payment & closing costs)

INCOME VERIFICATION

- Last two paystubs dated within last 30 days
- Letter of employment dated within last 30 days
- Last two year T1 Generals
- Last two year NOAs (if bonus is received and used to qualify)
- Last two year T4s
- Business license or Articles of incorporation
- Last two year business financial statements (balancesheet and income statements)

EXISTING PROPERTIES (IF APPLICABLE)

- Most recent rental lease agreements for all units
- Most recent mortgage statement for each property
- Most recent property tax statement for each property
- Confirmation of most recent condo fees
- Most recent T1 General (with Statement of Real Estate Rentals)

OTHER

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