



YOUR MORTGAGE **BROKER** \_\_\_\_\_  
\_\_\_\_\_  
LICENSE # \_\_\_\_\_  
PHONE # \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
\_\_\_\_\_  
WEB SITE \_\_\_\_\_  
E-MAIL \_\_\_\_\_

CUSTOMER **FIRST NAME** \_\_\_\_\_  
CUSTOMER **LAST NAME** \_\_\_\_\_  
CUSTOMER **PHONE #** \_\_\_\_\_



PLEASE COMPLETE THIS FORM ON **ADOBE READER**.  
CLICK HERE TO **GET IT FOR FREE** NOW.

# MORTGAGE APPLICATION

Applicants should complete this form as "Applicant 1" or "Applicant 2", as applicable. Applicant 2 information must also be provided (and the appropriate box checked) when a) the income or assets of a person other than the "Applicant 1" (including Applicant 1's spouse) will be used as a basis for loan qualification or b) the income or assets of the Applicant 1's spouse will not be used as a basis for loan qualification, but his or her liabilities must be considered because the Applicant 1 resides in a community property state, the security property is located in a community property state, or the Applicant 1 is relying on other property located in a community property state as a basis for repayment of the mortgage.

## MORTGAGE INFORMATION

Items marked with \* are required.

### Mortgage Details

\* Purpose of Loan ☐ Purchase ☐ Pre-Approval  
☐ Refinance ☐ Switch

Mortgage Amount  
Required \$ \_\_\_\_\_

Approx Date  
Funds Required \_\_\_\_\_ (MM/DD/YYYY)

### Preferred Mortgage Options

Please select all that apply ☐ Low rates at origination ☐ Low rates at renewal ☐ Flexible payment plans ☐ Flexible prepayment options  
☐ Access to Credit Life Insurance



**NEXT:** APPLICANT 1 INFORMATION

APPLICANT 1 INFORMATION

Items marked with \* are required.

Identification

Title	_____	Date of Birth	_____ (MM/DD/YYYY)
* First Name	_____	SIN #	_____
* Last Name	_____	Home Phone #	_____
Initial	_____	Work Phone #	_____
		MobilePhone #	_____
		E-mail Address	_____

Current Living Address

Residential Status	<input type="checkbox"/> Own	<input type="checkbox"/> Rent	Number	_____
	<input type="checkbox"/> Live with parents	<input type="checkbox"/> Other	Street Name	_____
Monthly Rent Payments	\$ _____		Street Type	_____
			Street Direction	_____
			Unit	_____
			City/Town	_____
			Province	_____
			Postal Code	_____
			Time at Residence	YY MM

Previous Living Address (If Time at Residence is less than 3 years in current liviing address)

Residential Status	<input type="checkbox"/> Own	<input type="checkbox"/> Rent	Number	_____
	<input type="checkbox"/> Live with parents	<input type="checkbox"/> Other	Street Name	_____
Monthly Rent Payments	\$ _____		Street Type	_____
			Street Direction	_____
			Unit	_____
			City/Town	_____
			Province	_____
			Postal Code	_____

APPLICANT 1 INFORMATION

Items marked with \* are required.

Present Employer

Occupation Type		Number	
Industry Sector		Street Name	
		Street Type	
Name of Employer		Street Direction	
Length of Employment	(YYMM Ex. 3 yrs 2 months = 0302)	Unit	
Years in Line of Business	(YYMM Ex. 3 yrs 2 months = 0302)	City/Town	
		Province	
		Postal Code	

Income

Type of Income		Other Income Source	
Annual Income	\$	Other Annual Income	\$

Past Employer (If Length of Employment is less than 3 years at present employer)

Occupation Type		Number	
Industry Sector		Street Name	
		Street Type	
Name of Employer		Street Direction	
Length of Employment	(YYMM Ex. 3 yrs 2 months = 0302)	Unit	
Years in Line of Business	(YYMM Ex. 3 yrs 2 months = 0302)	City/Town	
		Province	
		Postal Code	

Income

Type of Income		Other Income Source	
Annual Income	\$	Other Annual Income	\$

APPLICANT 2 INFORMATION

Items marked with \* are required.

Identification

Title

First Name

Last Name

Initial

Date of Birth (MM/DD/YYYY)

SIN #

Home Phone #

Work Phone #

Mobile Phone #

E-mail Address

Current Living Address

Same as Applicant 1

Residential Status

☐ Own

☐ Rent

☐ Live with parents

☐ Other

Monthly Rent Payments \$

Number

Street Name

Street Type

Street Direction

Unit

City/Town

Province

Postal Code

Time at Residence

YY

MM

Previous Living Address

(If Time at Residence is less than 3 years in current living address)

Same as Applicant 1

Residential Status

☐ Own

☐ Rent

☐ Live with parents

☐ Other

Monthly Rent Payments \$

Number

Street Name

Street Type

Street Direction

Unit

City/Town

Province

Postal Code

APPLICANT 2 INFORMATION

Items marked with \* are required.

Present Employer

Occupation Type		Number	
Industry Sector		Street Name	
		Street Type	
Name of Employer		Street Direction	
Length of Employment	(YYMM Ex. 3 yrs 2 months = 0302)	Unit	
Years in Line of Business	(YYMM Ex. 3 yrs 2 months = 0302)	City/Town	
		Province	
		Postal Code	

Income

Type of Income		Other Income Source	
Annual Income	\$	Other Annual Income	\$

Past Employer

(If Length of Employment is less than 3 years at present employer)

Occupation Type		Number	
Industry Sector		Street Name	
		Street Type	
Name of Employer		Street Direction	
Length of Employment	(YYMM Ex. 3 yrs 2 months = 0302)	Unit	
Years in Line of Business	(YYMM Ex. 3 yrs 2 months = 0302)	City/Town	
		Province	
		Postal Code	

Income

Type of Income		Other Income Source	
Annual Income	\$	Other Annual Income	\$

NEXT: SUBJECT PROPERTY INFORMATION

SUBJECT PROPERTY INFORMATION

Items marked with \* are required.

Property Value / Address

Purchase Price

\$

MLS Listing Number

Current Home Value

\$

For Refinance

Number

Street Name

Street Type

Street Direction

Unit

City/Town

Province

Postal Code

Same as Applicant 1's Address ☐

Expense Details

Monthly Taxes

\$

Tax Year

Monthly Condo Fee

\$

FINANCIAL INFORMATION

Items marked with \* are required.

Assets

Type	Where / Financial Institution(s)	Amount / Value
Cash in Bank / Saving		\$
RRSP		\$
Gift		\$
Vehicle		\$
Stocks, bonds, Mutual funds, etc		\$
Other Assets		\$
Household Goods		\$
Life Insurance		\$
Deposit on purchased		\$

Liabilities

Type	Where / Financial Institution(s)	Balance Owng	Monthly Payment
Credit Cards		\$	
Bank/Personal Loans		\$	\$
Automobile Loan		\$	\$
Alimony		\$	\$
Child Support		\$	\$
Student Loan		\$	\$
Wage Garnishment		\$	\$
Other Liabilities		\$	\$
Unsecured Line of Credit		\$	
Income Tax		\$	\$
Secured Line of Credit		\$	
Lease		\$	\$
Auto Lease		\$	\$

NET WORTH

=

TOTAL ASSETS

-

TOTAL LIABILITIES

\$

=

\$

-

\$

NEXT: REVIEW

REVIEW

Items marked with \* are required.

Note to Broker

ACKNOWLEDGEMENT AND AGREEMENT

The words "I", "me" and "my" mean the person who signs and submits this application. The words, "Verico Mortgage Broker" means an independent mortgage broker that is a member of the Verico Mortgage Broker Network. If I have included information in this application in respect of any other person, including a co-applicant, I hereby confirm that such other person(s) has fully authorized me to release their personal information to my Verico Mortgage Broker and that such other person(s) consent to all of the terms set-out herein. The word "Information" means personal information about me and any other person(s) identified in this application, obtained from this application or other sources. I request that this application be submitted to my Verico Mortgage Broker as soon as possible. I understand that in submitting my application to my Verico Mortgage Broker, I am hereby expressly consenting to the submission of my application and the disclosure of Information to third parties, such as lenders, insurers, credit reporting agencies, and the Verico Mortgage Brokers national or local affiliates, for the purpose of arranging and/or renewing mortgage(s). I understand that this will allow lenders to submit commitments for my review. I hereby consent to and agree that my Verico Mortgage Broker may use the Information in order to identify me, protect me from fraud and error, understand my needs and eligibility for products and/or services, recommend particular products and services to meet my needs, provide ongoing services, and comply with legal and regulatory requirements. I consent to and agree that my Verico Mortgage Broker may use the Information for the above-noted purposes and may obtain Information about me from others, including consumer reporting agencies, credit bureaus, financial institutions, and real estate appraisers and may confirm the accuracy of the Information by contacting such third parties. I further consent to and agree that each lender considering my application may obtain Information about me (and all co-applicants) from others, including consumer reporting agencies, credit the Information by contacting such third parties. I hereby consent to and agree that my Verico Mortgage Broker may retain the Information after the last mortgage application made on my behalf, or the end of the term of the mortgage, whichever is later and that my Verico Mortgage Broker may retain and use my personal information for the purposes listed above after the last mortgage application made on my behalf. I hereby acknowledge that I have been advised that Mortgage Life/Creditor Insurance may be available to me through a lender, insurance company or broker and take sole responsibility to investigate and secure such coverage if desired. I acknowledge that my Verico Mortgage Broker is an independently owned and operated member of the Verico Mortgage Broker Network (VERICO). I further acknowledge that my Verico Mortgage Broker and VERICO have no obligation to locate a lender and no responsibility or liability for any acts or omissions of any lender including failure to secure any loan by any deadline. I hereby acknowledge that my Verico Mortgage Broker may receive consideration from a lender, and that consideration may vary with the mortgage interest rate and mortgage terms accepted by me. Such consideration may include monetary fees, or goods and services having value to the recipient. The parties hereto confirm that it is their wish that this Agreement, as well as all other documents relating hereto, including notices, have been and shall be drawn up in the English language only. **Les parties aux présentes confirment leur volonté que cette convention, de meme que cette convention, de mem que tous les documents, y compris tout avis qui s'y rattache, soient rediges en langue anglaise.**

Applicant 1 :

☐ I hereby agree to all terms in the above agreement and: (a) certify that the information given in my application is complete and correct, (b) consent to this agreement being exchanged by email and other electronic means, which may be less secure than mail, (c) consent that this electronic agreement shall be deemed as valid as a paper contract, and (d) consent that my printed name below shall act as my signature.  
I agree to receive electronic messages containing news and updates relevant to me and/or the mortgage industry. I understand my consent can be withdrawn at any time.

Applicant 2 (if applicable) :

I hereby agree to all terms in the above agreement and: (a) certify that the information given in my application is complete and correct, (b) consent to this agreement being exchanged by email and other electronic means, which may be less secure than mail, (c) consent that this electronic agreement shall be deemed as valid as a paper contract, and (d) consent that my printed name below shall act as my signature.  
**(Only required if there is an Applicant 2)**  
I agree to receive electronic messages containing news and updates relevant to me and/or the mortgage industry. I understand my consent can be withdrawn at any time.

Applicant 1's Signature  
(Your typed name is your signature)

Date (MM/DD/YYYY)

Applicant 2's Signature  
(Your typed name is your signature)

Date (MM/DD/YYYY)

END OF THE APPLICATION

