



MORTGAGE AGENT CHECK LIST *(to be sent along with mortgage application)*

For CMS Real Estate's Mortgage Division to assist and accelerate an approval for you and your applicant's submission to borrow funds please provide the following documents and information upon submission of your application.

Documents and Information required when submitting new Applications. Please check the box of what information has been submitted with the application.

If your mortgage application does not include the following information please provide in the space provided below.

- Mortgage application form
 - Credit Reports
 - Applicant 1
 - Applicant 2
 - Applicant 3
 - Applicant 4
 - Applicant 5
 - Applicant 6

Title or legal description of property being mortgaged (***WE DO NOT DO MOBILES***)

Property 1 _____	Lot/Unit: _____	Block: _____	Plan: _____
Property 2 _____	Lot/Unit: _____	Block: _____	Plan: _____
Property 3 _____	Lot/Unit: _____	Block: _____	Plan: _____

First Mortgage Information Required

- 1st Mortgage Holder _____
- 1st Mortgage Balance _____
- 1st Mortgage Payment _____
- 1st Mortgage Maturity date _____

Second Mortgage Information Required (if applicable)

- 2nd Mortgage Holder _____
- 2nd Mortgage Balance _____
- 2nd Mortgage Payment _____
- 2nd Mortgage Maturity date _____

- Mortgage Summary
 - Brief description of circumstances surrounding transaction

- Requested amount of Funds _____

Use of Funds _____

Amount of your broker fees _____

If Debt consolidation list what debts and amount to be paid

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Annual property taxes of property being mortgaged _____

Income and Source of Income

Applicant 1 _____

Applicant 2 _____

Applicant 3 _____

Applicant 4 _____

Business for Self Information

Business Name: _____

Business Address: _____

Type of Business:

Limited Company

Partnership

Sole Proprietorship

Date of Incorporation: _____

Number of years in business: _____

Nature of Business: _____

Offer to Purchase (if applicable)

Condominium Fees (if applicable)

Condominium Documents (if applicable)

By-laws

Latest financial statement

Current year's budget

Minutes from last annual general meeting and subsequent meeting

Reserve fund study

Estoppels certificate (CMS will instruct lawyer to obtain)

Appraisal by approved appraiser (see attached list of approved appraisers)