

Client Snapshot

Client Name: _____

Phone: _____

Email: _____

How did you hear about us? _____

What is your marital status? _____

Any child/spousal support owed or received? ☐ No ☐ Yes

How Much? _____

Any dependent children? ☐ No ☐ Yes Ages? _____

Any CCB from the government? ☐ No ☐ Yes How much? _____

Mortgage Goal

☐ Pre-Approval ☐ Approval

☐ Purchase ☐ Refinance ☐ Switch/Transfer ☐ Debt Consol ☐ ETO

What's the timeline for this? _____

Property & Down Payment

What is the property type?

☐ Condo ☐ Townhome ☐ Detached ☐ O/O ☐ Rental ☐ Other: _____

What is the purchase price/estimated value? _____

How much for DP? \$ _____ Existing mortgage \$ _____

Where is the down payment coming from?

☐ Savings ☐ Gifted ☐ RRSP ☐ Borrowed ☐ Other: _____

Is that all in one account or multiple? _____

Make sure to not move any money around until told to do so.

Income & Employment

What do you do for employment? _____

☐ Salaried ☐ Hourly ☐ Commission ☐ Self Employed ☐ Contract

What is your annual income? \$ _____

How long have you been at your current job/business? _____

Co-Borrower? ☐ No ☐ Yes Who? _____

Additional Info

Do you own any additional properties? ☐ No ☐ Yes Value(s) \$ _____

Is there a mortgage or a HELOC on it? ☐ No ☐ Yes Balance \$ _____

Are you a co-signor on any properties? ☐ No ☐ Yes Balance \$ _____

Is there a mortgage or a HELOC on it? ☐ No ☐ Yes Balance \$ _____

What is your credit score? _____ Any large monthly payments? _____

Is there anything else you think I should know? _____

