



Tel: 604-501-8888 || Fax: 604-249-4189 || 305 – 5446 152 Street, Surrey, BC V3S 5J9

Mr. Mrs. Ms. Other

BORROWER 1:

Name (first/initial/last): _____
 Address: _____
 City: _____ Prov. _____ Postal Code: _____
 Home: (____) _____ Cell: (____) _____
 Email Address: _____
 Years at Current Residence: _____ Months: _____
Dwelling Status: Rent Own Living with Parents Other: _____
 If renting, monthly amount: \$ _____

Mr. Mrs. Ms. Other

BORROWER 2:

Name (first/initial/last): _____
 Address: _____
 City: _____ Prov. _____ Postal Code: _____
 Home: (____) _____ Cell: (____) _____
 Email Address: _____
 Years at Current Residence: _____ Months: _____
Dwelling Status: Rent Own Living with Parents Other: _____
 If renting, monthly amount: \$ _____

CLIENT INFORMATION:

Birth Date: (M/D/Y) _____
 S.I.N.: _____ # of Dependents: _____
 Photo ID type: _____ ID #: _____

Marital Status: Single Married Common-Law Separated Widowed Divorced

CLIENT INFORMATION:

Birth Date: (M/D/Y) _____
 S.I.N.: _____ # of Dependents: _____
 Photo ID type: _____ ID #: _____

Marital Status: Single Married Common-Law Separated Widowed Divorced

Income Information:

EMPLOYMENT:

Current Employer: _____
 Address: _____ City: _____ Prov: _____
 Occupation: _____ Industry _____
 Years Worked: _____ Annual Income: \$ _____
 Years in Industry: _____

Income Type:

Employed Self-Employed Pension Other

Additional Income: Source: _____ Amount: \$ _____

EMPLOYMENT:

Current Employer: _____
 Address: _____ City: _____ Prov: _____
 Occupation: _____ Industry _____
 Years Worked: _____ Annual Income: \$ _____
 Years in Industry: _____

Income Type:

Employed Self-Employed Pension Other

Additional Income: Source: _____ Amount: \$ _____

Assets & Liabilities:

Assets Type	Financial Institution	Asset Value	Liability Type	Liability Balance	Monthly Payment	Lender
Savings	_____	\$ _____	Car Loan/Lease	\$ _____	_____	_____
GIC/Stocks etc	_____	\$ _____	Line of Credit	\$ _____	_____	_____
RRSP/TFSA	_____	\$ _____	Personal Loan	\$ _____	_____	_____
Vehicle 1	_____	\$ _____	Credit Crads	\$ _____	_____	_____
Vehicle 2	_____	\$ _____	Credit Cards	\$ _____	_____	_____
Business Account	_____	\$ _____	Other	\$ _____	_____	_____

Property Information:

Property Address	Financial Institution	Condo Fee	Property Value	Mortgage Balance	Monthly Payment
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Lawyer/Notary Information (if known):

Name of Lawyer: _____ Firm Name: _____ Phone Number: _____
 Address: _____ Prov: _____ Postal Code: _____ Fax Number: _____



Client Service Agreement and Consent Form

For: _____
Borrower 1 **Borrower 2** **Mortgage Agent Name**

I/We are clients of each Mortgage Wisdom Corporation and the above noted Mortgage Agents and hereby authorize the use of personal information that I/We have provided for these purposes:

- arranging and/or renewing loan(s)/mortgage(s) and maintaining my client relationship, and
- considering products approved by Mortgage Wisdom Corporation or its affiliates that may interest me/us.

and I consent and agree that for these purposes:

Mortgage Wisdom Corporation may use my personal information and may:

- obtain personal information about me from consumer reporting agencies, credit bureaus, and real estate appraisers, and (if more than one client) about either of us from the other, and
- provide my personal information to third parties (e.g. lenders, Equifax, Filogix, Velocity, The Mortgage Centre Canada, DLCCG);

Each lender considering my applications from Mortgage Wisdom Corporation may:

- obtain personal information about me from consumer reporting agencies, credit bureaus, and real estate appraisers, and (if more than one client) about either of us from the other, and
- ensure the accuracy of my personal information by contacting third parties;

Mortgage Wisdom Corporation and these lenders may:

- retain my personal information for seven years after the last loan/mortgage application made on my behalf, or the end of the term of the loan/mortgage, whichever is later;

My Mortgage Agents may:

- retain and use my personal information for the purposes listed above for seven years after the last loan/mortgage application made on my/our behalf;

“My Information File”:

- is kept physically at the office of My Mortgage Agents until a loan/mortgage is funded, after which it is sent to a Mortgage Wisdom Corporation corporate for review and storage, and electronically on Mortgage Wisdom Corporation computer systems; and
- has access restricted to individuals having a need to deal with the File;

I/We can:

- review and correct personal information in My File or held by My Mortgage Agents;
- get Mortgage Wisdom Corporation Privacy Policy from My Mortgage Agents

Other:

- My Agents are not employees of Mortgage Wisdom Corporation
- I can obtain My Mortgage Agents' Privacy Policy from My Mortgage Agents;
- Mortgage Wisdom Corporation and My Mortgage Agents may receive fees from each lender, and may receive a program fee from the lender which varies with the mortgage interest rate and terms accepted by me. Fees and program fees may be money, or goods and services having value to the recipient;
- Different lenders may provide Mortgage Wisdom Corporation and My Mortgage Agents with different fees and incentives for similar products.
- A Lender's fees and incentives may also be dependent on amounts and types of business originated through Mortgage Wisdom Corporation and My Mortgage Agents; and
- Each person signing below agrees that in this document “I”, “me” and “my” refer to each of us.
- I/We would like to provide you with mortgage related information that is relevant to you. Canada's anti-spam legislation went into effect on July 1, 2014. Under this legislation, I am required to obtain your consent in order to send you communications about the latest mortgage news, events, products and services. By signing this agreement, I agree to receive electronic communications.

Client's Signature: Borrower 1

Date

Second Client's Signature: Borrower 2

Date

BORROWER POLITICALLY EXPOSED PERSON (PEP) DECLARATION

Declaration Date: _____

Borrower 1: _____

Borrower 2: _____

Broker: Harry Toor

Effective October 11, 2024, the Anti-Money Laundering (AML) and Anti-Terrorist Financing (ATF) legislation will apply to all Mortgage Brokers and Brokerages. As a result, this legislation requires that Mortgage Brokers and Brokerages obtain the following information in connection with clients who are politically exposed.

1. Have the Borrower(s), or one of their family members or close associates, ever been: (i) a Foreign Politically Exposed Person; (ii) a Domestic Politically Exposed Person; or (iii) a Head of an International Organization.
- (i) A foreign PEP is a person who holds or has held one of the following offices or positions in or on behalf of a foreign state: head of state or head of government; member of the executive council of government or member of a legislature; deputy minister or equivalent rank; ambassador, or attaché or counsellor of an ambassador; military officer with a rank of general or above; president of a state-owned company or a state-owned bank; head of a government agency; judge of a supreme court, constitutional court or other court of last resort; or leader or president of a political party represented in a legislature.
 - (ii) A domestic PEP is a person who currently holds, or has held within the last 5 years, a specific office or position in or on behalf of the Canadian federal government, a Canadian provincial (or territorial) government, or a Canadian municipal government. Specifically, the person has held the office or position of: Governor General, lieutenant governor or head of government; member of the Senate or House of Commons or member of a legislature; deputy minister or equivalent rank; ambassador, or attaché or counsellor of an ambassador; military officer with a rank of general or above; president of a corporation that is wholly owned directly by His Majesty in right of Canada or a province; head of a government agency; judge of an appellate court in a province, the Federal Court of Appeal or the Supreme Court of Canada; leader or president of a political party represented in a legislature; or mayor, reeve or other similar chief officer of a municipal or local government
 - (iii) A HIO is a person who currently holds or has held within the last 5 years the specific office or position of head of an international organization and the international organization that they head or were head of is either: an international organization established by the governments of states; an institution of an organization referred to in 1 above; or an international sports organization.

Borrower 1: ☐ Yes ☐ No

Borrower 2: ☐ Yes ☐ No

Signature: Borrower 1

Signature: Borrower 2

Harry Toor
