



Mortgage Financing – Checklist

*In order to properly process your financing application,
please use the following checklist to prepare your information.*

1) Information Required

- Your Name
- Your Contact Information
 - Phone Number
 - Email Address
- Type of Financing required
 - Refinance/Arrange New Mortgage
 - CMHC
 - Assume Existing Mortgage
 - Second Mortgage
- Loan Amount Needed
 - Downpayment
 - Property Value
- Purpose of Loan

2) Documents Required for Preliminary Analysis (Term Sheet)

- Property Information
 - Full Address
 - Type
 - Number of Units
- Photos of the front of the building
- Operating Statement
 - Income: Recent Rent Roll & Laundry (if any)
 - Final Tax Bill
 - Insurance Premium
 - Heating Bills for the past 12 months
 - Hydro Bills for the past 12 months
 - Water/Sewer Bills for the past 12 months
 - Management and Superintendent expense
- Financial Statement for the past 2 years

3) Additional Documents Required for submission to Credit Committee

- Lender/CMHC Application Fee (if any)
- Net Worth Statement for all applicants associated with the property
- Certified Rent Roll with tenant names and move-in dates
- Phase 1 Environmental Report
- Capital Expenses for the past 3 years
- Other specified documentation as per Term Sheet (if any)