

Donna Wong

Mortgage Agent Level 2

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Mortgage Document Request List:

Getting Started

- Completed Mortgage Application**
- Engagement Letter**-Signed by all applicants
- ID 2 pieces**-Driver's licence, credit card and/or passport picture of front and back from each applicant

Income Documents

- Paystubs**- 2 current paystubs dated within 30 days.
- Your most recent 2 years of all T slips**- T4, T4A, T4E, T5, T5007, T5008, T5013,T3
- Notice of Assessment 2 years**- Most recent of 2 years of NOA summary of your received tax return all pages even if last page is blank
- T1 General (Full) 2 years**- Most recent of 2 years of general tax return
- Confirmation of Payment /No taxes owing statement**- If any taxes are owing, please provide confirmation of payment.
- Letter of Employment**- Dated within 60 days.

Down payment and Assets Documents

- 90-day account history**- Bank account(s) where the down payment and closing cost will be drawn
- Investment Statements**- If applicable, 3 months with summary page

Business that is a corporation/Business for self

- Statement of Business Activities**- Most recent of 2 years
- Notice of Assessment 2 years**- Most recent of 2 years of NOA summary of your received tax return
- T1 General (Full) 2 years**- Most recent of 2 years of general tax return
- 2 Years of Financials**- Prepared by an accountant.
- Articles of Incorporation**
- Business License**
- GST/HST return or Registration**
- 90-day account history**- Bank account(s) where the down payment and closing cost will be drawn

Subject and non subject properties

- Accepted Offer to Purchase**- Of the property you are purchasing
- MLS Listing – PDF- Property details** – Your realtor can provide this information
- Lease**- If applicable for all properties (switch/transfer/refinancing/purchase)
- Confirmation of Condo Fees**- If applicable (switch/transfer/refinancing/purchase)
- Renewal Letter**- If applicable (switch/transfer)
- Final Property tax statement** - If applicable for all properties (switch/transfer/refinancing)
- Property Insurance**- If applicable for all properties (switch/transfer/refinancing/purchase)
- Current Mortgage statement**- If applicable for all properties (switch/transfer/refinancing)

Other Documents

- Separation agreement**- If applicable
- Child tax benefit statements**- If applicable
- Full solicitor's contact details**
- VOID Cheque**