



**KELLY**

| MORTGAGE SERVICES INC |

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**BROKERAGE # 10276**



## MORTGAGE APPLICATION

APPLICANT			CO-APPLICANT		
First Name	Last Name		First Name	Last Name	
Home Phone	Work Phone		Home Phone	Work Phone	
Cell Phone	Email Address		Cell Phone	Email Address	
DOB: MM/DD/YY	Social Insurance #		DOB: MM/DD/YY	Social Insurance #	
Marital Status		Preferred Contact Method	Relationship to Borrower		Preferred Contact Method
<input type="checkbox"/> Married <input type="checkbox"/> Common-Law <input type="checkbox"/> Single <input type="checkbox"/> Divorced		<input type="checkbox"/> Email <input type="checkbox"/> Home Phone <input type="checkbox"/> Cell Phone	<input type="checkbox"/> Spouse/Partner <input type="checkbox"/> Engaged <input type="checkbox"/> Business Partner <input type="checkbox"/> Other		<input type="checkbox"/> Email <input type="checkbox"/> Home Phone <input type="checkbox"/> Cell Phone
Present Address		# of Years	Present Address (if different from Applicant)		# of Years
City	Province	Postal Code	City	Province	Postal Code
Do you own or rent?		Current Rent	Do you own or rent?		Current Rent
<input type="checkbox"/> Rent <input type="checkbox"/> Own		\$	<input type="checkbox"/> Rent <input type="checkbox"/> Own		\$
Previous address, if less than 3 years at current address			Previous address, if less than 3 years at current address		
Previous Address		Years there	Previous Address		Years there
City	Province	Postal Code	City	Province	Postal Code

Purpose of Funds				
<input type="checkbox"/> Pre-approval	<input type="checkbox"/> Purchase	<input type="checkbox"/> Transfer of Mortgage	<input type="checkbox"/> Refinance/equity takeout	
Purchase Price or Estimated Value	Amount of Funds Required	Down Payment or Equity	Source of Down Payment (for purchases)	Closing Date /Date Funds Required

Applicant's Current Employer			Co-Applicant's Current Employer		
Address /Department			Address / Department		
City / Province			City / Province		
Title / Position		Income Type	Title/ Position		Income Type
		<input type="checkbox"/> Salary <input type="checkbox"/> Hourly \$ ____/hour			<input type="checkbox"/> Salary <input type="checkbox"/> Hourly \$ ____/hour
Annual Income:		<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Seasonal <input type="checkbox"/> Self Employed	Annual Income:		<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Seasonal <input type="checkbox"/> Self Employed

If self-employed, provide average income for past 2 years:			If self-employed, provide average income for past 2 yrs:		
# of years with current employer			# of years with current employer		
# of years in this line of work			# of years in this line of work		
Do you earn additional income (ie. Rental income, child support, alimony or pension)? Please include.			Do you earn other income (ie. Rental income, child support, alimony or pension)? Please include.		
Previous Employer (if with current employer < 3 years)			Previous Employer (if with current employer < 3 years)		
Title / Position	Years There	Gross Annual Income	Title / Position	Years There	Gross Annual Income
If Self Employed, please provide gross business revenue:			If Self Employed, please provide gross business revenue:		

Combined Assets			Combined Liabilities			
Assets	Description/ Financial Institution	Value	Liabilities	Financial Institution	Balance	Monthly Pmt
Principal Residence		\$	Current Mortgage		\$	\$
Savings in Bank		\$	Personal Loans		\$	\$
Stocks/ Bonds		\$	Line of Credit		\$	\$
Auto (make, model & yr)		\$	Car Payment		\$	\$
Auto (make, model & yr)		\$	Car Payment		\$	\$
RRSP's		\$	Credit Cards		\$	\$
Other Property		\$	Other Mortgage		\$	\$
Rental Property		\$	Rental Mortgage		\$	\$
Other Asset(s)		\$	Other Loans		\$	\$
Other Asset(s)		\$	Other Loans		\$	\$

<b>Subject Property Address</b>			<b>Property Type</b>		
			<input type="checkbox"/> Bungalow <input type="checkbox"/> Two-Story <input type="checkbox"/> Multi-Unit <input type="checkbox"/> Condo <input type="checkbox"/> Commercial <input type="checkbox"/> Other _____		
Approx. Square Feet	Municipality		Water Info	Sewage Info	
			<input type="checkbox"/> Municipal <input type="checkbox"/> Well	<input type="checkbox"/> Municipal <input type="checkbox"/> Septic	
Lot Size	Property Taxes/year	Condo Fees	Age of Building	Estimated Heating cost/year	
Purchase Price	Purchase Date	Garage Type		Garage Location	
		<input type="checkbox"/> None <input type="checkbox"/> Single <input type="checkbox"/> Double		<input type="checkbox"/> Attached <input type="checkbox"/> Detached	
<b>Additional Information:</b>					

Subject Property Current Lender	Balance Owing	Monthly Payment	Term Type (open/closed)	Maturity Date (if closed)	Current Int. Rate
Type of Loan on Property	Original Balance	If you need to list other mortgages, please do so on back of page			
<input type="checkbox"/> Mortgage <input type="checkbox"/> Secured LOC					

Credit Information	Yes	No
Have you ever declared bankruptcy?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any suits, judgments or collections pending against you?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please explain:		
Are personal income taxes and property taxes up to date? If not, please provide details, including arrears amount owing:		

Additional Information

By signing below you affirm that the information you have given in this Application is true and complete and that you have not withheld any information. We will rely on the information you have given to process your Application. You also agree to the terms below.

\_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
**Date**                                      **Applicant Signature**                                      **Co-Applicant's Signature**

**CONSENT TO COLLECT AND USE PERSONAL INFORMATION**

When you apply for a mortgage with us, you agree that:

1. We may collect and use personal information from you and about you for the following purposes: (a) to understand your needs (b) to determine the suitability of our products and services for you (c) to determine your eligibility for various products and services (d) to establish, manage and offer products and services that meet your needs (e) to provide on-going service and (f) to meet our legal and regulatory requirements.
2. We may use, give to, obtain, verify, share and exchange credit and other information about you with others, including credit bureaus, mortgage insurers, credit insurers, registries and other person with whom you may have financial dealings, as well as any other person as may be permitted or required by law. You also authorize any person whom we contact in this regard to provide such information to us.

*We ask you for your Social Insurance Number to use in verifying and reporting credit information to credit bureaus and credit reporting agencies. You may refuse to consent to its use or disclosure for these purposes.*

**Please return this application form to our office by fax (613) 727-9729  
or scan and email to [allison@kellymortgages.com](mailto:allison@kellymortgages.com)**

**Thank you. Your business is appreciated!**