



Client Document Checklist



Depending on what we are helping you with (purchase, refinance, renewal) lender document requirements will vary. Please be prepared to provide the following documents as required.

Income

- Employment letter dated within 30 days. Must include start date, salary, hourly wage & hours (if applicable), status, contact info of signor, and signature.
- Last 2 Paystubs that match employment letter
- Last 2 years T4s
- Last 2 years Notice of Assessments
- Last 2 years T1 Generals
- Lease agreement(s)
- Current business/ corporate search outlining the directors of the business
- Last ___ months of business bank account statements
- ___ months of account statements to confirm income deposits
- Last 2 year's business financial statements

Down Payment (purchase)

- 90 days of account history for all funds to be used for down payment
- Screenshot of profile page to match account number on bank statements to name
- Gift letter
- Copy of the draft/ cheque matching gift
- First Time Home Buyer RRSP Withdrawal Form (T1036)

Property (Purchase)

- MLS highlight sheet (paragon)
- Purchase agreement
- Condo Documents
- Appraisal (we will order this when ready)

Refinance / Switch

- Current existing mortgage statement(s)
- Most recent property tax bill(s)
- Statement(s) for any debt being paid out from proceeds
- Copy of the home insurance policy

Other

- Void Cheque
- Separation agreement
- _____
- _____
- _____
- _____
- _____

While the above documents are commonly required for mortgage transactions. Lenders reserve the right to request additional documents at anytime for any reason.



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