

Mortgage Refinancing/ Switch Checklist



CPA
ADVICE CENTRE

Name
Telephone
Email
Referred by
Marital Status <input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Common-law <input type="radio"/> Separated <input type="radio"/> Divorced <input type="radio"/> Other
Name of Spouse
Number of Children & Age
Name of your Bank(s)

Documents Required

- Business Bank Statements for last 12 months
- Canada Child Benefit (CCB) statement
- Company Incorporation documents
- Current Employment Letter(s) and Pay Stub within 60 days
- Last 3 months Bank account statements of all applicants
- Last two years NOA and T4 of all applicants
- Mortgage Statements (latest)
- Property Tax Bills
- Two piece of ID one must have photo ID like Driving License/Passport /PR Card

More details

Property Market Value	Mortgage Requested
Mortgage Balance	Source of Down-Payment
Property-Tax Balance	Employment Income
Rental Income	Business Income
Any Other Income	Credit Card Balances
Car Loan Balance	Line of Credit Balances
Monthly Car Loan Payment	Savings & Investments
Student Loan Monthly Payment	
Credit Score <input type="radio"/> 700 or more <input type="radio"/> 680-699 <input type="radio"/> 650-679 <input type="radio"/> <650	
<input type="radio"/> Collections <input type="radio"/> Consumer Proposal <input type="radio"/> Bankruptcy	