

Contact Information		
Tel:	Cel:	Email:
Present Address		No of Years
Previous Address		No. of Years

KNOW YOUR CLIENT INFORMATION

What are your goals with regards to this mortgage?

- Purchase: Price Range from \$_____ to \$_____

Downpayment Available: \$_____
- Obtain a lower rate: Current Rate: _____%
- Obtain a lower payment: Current Payment: \$_____
- Consolidate Debt: Amount: \$_____
- Renovations: Amount: \$_____ Type of Renovations: _____
- Other. Explain: _____

What is the amount of the mortgage payment that you believe would fit your current lifestyle?
 From \$_____ to \$_____ per month

What interest rate range do you expect to obtain?
 From _____% to _____%

Do you plan on moving in the next 5 years? If yes, when?

Do you plan on changing employers in the next 5 years? Is yes, when?

Do you believe your current home will meet your family's needs over the next five years? If not, why?

- Yes No

Do you typically receive bonus or commission income in addition to your regular income? If yes, how often?

- Annually Monthly

Do you intend to make a lump sum payment or payments on your mortgage to pay it off faster?

Yes No

Which is most important to you:

- Debt Repayment: Paying your mortgage off as soon as possible?
- Cash Flow: Having a low or the lowest payment possible?

Which is most important to you:

- Mortgage Payment: Having a mortgage payment that fits your cash flow?
- Interest Rate: Having a low or the lowest interest rate possible?

When it comes to your mortgage payment, would you say that you would like a mortgage payment that:

- stays the same month to month?
- might increase or decrease if there is the potential to save money?

If given the option to have a variable interest rate that is lower than a fixed interest rate, would you:

- Be willing to watch interest rates on a monthly basis to ensure that your mortgage has the best rate possible?, OR
- Prefer to have a fixed interest rate that did not fluctuate and did not require regular attention?

Risk Tolerance Scale

Choose the number that best reflects your level of risk tolerance.

- 0 LOW
- 1
- 2
- 3
- 4 MEDIUM
- 5
- 6 MEDIUM HIGH
- 7
- 8
- 9 HIGH

Certification

By signing below you certify that the information in this form is accurate and will be considered current unless we are notified otherwise. We are compliant with current PIPEDA legislation and our "Privacy Policy" can be viewed on our website at www.Samplemortgagesinc.ca/PrivayPolicy.html. Personal information will be held in the strictest of confidence and only released to third parties to fulfill our obligations to you or to comply with regulatory requirements or when required to do so by law.

Client Signature:

Date: