

Mortgage Pre-Approval Checklist

To help us help you find the right mortgage solution, please prepare the following documents for your mortgage pre-approval meeting:

Social Insurance Number (must bring)

Two Pieces of Government-Issued ID:
(Either two primary, or one primary and one secondary)

Primary ID Sources:

- Driver's license (Canadian)
- Passport (Canadian or foreign)
- Permanent Resident card

Secondary ID Sources:

- Birth Certificate Citizenship card
- Major Canadian credit card

Proof of Income: (one or more of the following)

- Most recent T4 and recent pay stub
- Two most recent pay stubs
- Two years of personal income tax returns including notices of assessment (if self employed)
- Most recent notice of assessment and pay stub
- Letter of employment and pay stub

List of Assets:

- Investments
- Proof of down payment*
- Other real estate assets (ex. cottages)
- Owned property
- Recreational vehicles
- RRSP / TFSA
- Vehicles (year, make, model)

List of Liabilities:

- Mortgage statement including monthly payment amount
- Car loans
- Child or spousal support payments
- Co-signed or guaranteed loans
- Credit card balances
- Existing mortgages
- Lines of credit
- Personal loans
- Property tax bill amount
- Student loans

*A 90-day history of the down payment funds may be required.

1.800.264.2926

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