

# 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 or income tax & recent pay stub
- Two years of personal income tax returns including notices of assessment (*if self employed*)
- Letter of employment & recent pay stub

List of Assets:

- Investments & RRSP / TFSAs
- Proof of down payment\*
- Owned property & Other Real Estate
- Recreational vehicles
- 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.