

LOAN/CREDIT

Application

One focus, many solutions.



PLANNING



INVESTING



LENDING



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LOAN/CREDIT Application

Please check if you are: EDUCATION MEMBER FAMILY MEMBER NEW CLIENT EXISTING CLIENT

School board affiliation(s): OSSTF ETFO OECTA AEFO OPC

CPCO COLLEGE UNIVERSITY PRIVATE SCHOOL OTHER _____

DETAILS

Purpose of application

MORTGAGE LOAN

LINE OF CREDIT-SECURED LINE OF CREDIT-UNSECURED

OTHER (PLEASE SPECIFY): _____

AMOUNT APPLIED FOR: _____

How did you hear about us?

COLLEAGUE FAMILY ENEWS

ONLINE WORKSHOP

PUBLICATION (PLEASE LIST): _____

OTHER (PLEASE SPECIFY): _____

CONTACT INFORMATION

Applicant

MR MRS MISS MS PROF.

FIRST NAME MIDDLE NAME

LAST NAME

SOCIAL INSURANCE NUMBER DATE OF BIRTH (MM/DD/YY)

MARITAL STATUS # OF DEPENDANTS

CURRENT ADDRESS APT/UNIT #

CITY PROVINCE POSTAL CODE

HOW LONG AT CURRENT ADDRESS OWN RENT: RENT PER MONTH

HOME PHONE CELL PHONE

EMAIL ADDRESS

PREVIOUS ADDRESS (IF LESS THAN 3 YEARS AT CURRENT ADDRESS) APT/UNIT #

CITY PROVINCE POSTAL CODE

HOW LONG AT PREVIOUS ADDRESS

Co-Applicant

MR MRS MISS MS PROF.

FIRST NAME MIDDLE NAME

LAST NAME

SOCIAL INSURANCE NUMBER DATE OF BIRTH (MM/DD/YY)

MARITAL STATUS # OF DEPENDANTS

CURRENT ADDRESS APT/UNIT #

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EMAIL ADDRESS

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FINANCIAL INFORMATION

Assets

<input type="checkbox"/> CHEQUING	<input type="checkbox"/> SAVINGS	_____	\$ _____
		INSTITUTION	TOTAL AMOUNT
<input type="checkbox"/> RRSP		_____	\$ _____
		INSTITUTION	TOTAL AMOUNT
<input type="checkbox"/> RRSP		_____	\$ _____
		INSTITUTION	TOTAL AMOUNT
<input type="checkbox"/> TFSA		_____	\$ _____
		INSTITUTION	VALUE
<input type="checkbox"/> RESP		_____	\$ _____
		INSTITUTION	VALUE
VEHICLE 1 MAKE	MODEL	YEAR	\$ _____
			VALUE
VEHICLE 2 MAKE	MODEL	YEAR	\$ _____
			VALUE
STOCK/BONDS		_____	\$ _____
		INSTITUTION	TOTAL AMOUNT
MUTUAL FUNDS		_____	\$ _____
		INSTITUTION	TOTAL AMOUNT
GIC/TERM DEPOSIT		_____	\$ _____
		INSTITUTION	TOTAL AMOUNT
(ADD UP VALUE/AMOUNTS OF ALL ASSETS)			\$ _____
			TOTAL ASSETS

Liabilities

<input type="checkbox"/> LINE OF CREDIT 1	_____	\$ _____
	INSTITUTION	AMOUNT OWING
<input type="checkbox"/> LINE OF CREDIT 2	_____	\$ _____
	INSTITUTION	AMOUNT OWING
<input type="checkbox"/> AUTO LOAN 1	_____	\$ _____
	INSTITUTION	AMOUNT OWING
<input type="checkbox"/> AUTO LOAN 2	_____	\$ _____
	INSTITUTION	AMOUNT OWING
<input type="checkbox"/> CREDIT CARD 1	_____	\$ _____
	INSTITUTION	AMOUNT OWING
<input type="checkbox"/> CREDIT CARD 2	_____	\$ _____
	INSTITUTION	AMOUNT OWING
<input type="checkbox"/> CREDIT CARD 3	_____	\$ _____
	INSTITUTION	AMOUNT OWING
<input type="checkbox"/> CREDIT CARD 4	_____	\$ _____
	INSTITUTION	AMOUNT OWING
OTHER LOAN/DEBT	_____	\$ _____
	INSTITUTION	AMOUNT OWING
OTHER LOAN/DEBT	_____	\$ _____
	INSTITUTION	AMOUNT OWING
(ADD UP TOTAL AMOUNT OWING OF ALL LOANS/DEBTS)		\$ _____
		TOTAL LIABILITIES

NOTES



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PIPEDA CONSENT FORM

Educators Financial Group Inc., in accordance with our privacy policy and obligations at law, collect, receive, use and disclose personal information about you, our client, for the purposes of verifying information provided; assessing your credit-worthiness; establishing credit and hold limits; maintaining client relationship; presenting your mortgage/loan/line of credit application to lenders/insurers to secure and/or renew a mortgage/loan/line of credit and/or relation services, and providing information to you about other products offered or approved by us, our affiliates, related entities or other third party financial partners.

By signing this form you agree to our collecting, using and disclosing your personal information at any time during the application, and on an on-going basis thereafter, for the foregoing purposes. We may disclose your personal information to, and receive your personal information from: consumer reporting agencies, credit bureaus, collection agencies, real estate appraisers, your present and past financial institutions, your past mortgage brokers, your present and past employers, creditors and tenants, your spouse or any third parties who may have information about your financial status, potential purchasers of our business and their advisors, any third party service providers to whom we may outsource our business functions, parties involved in the securitization, assignment or pledge of loan(s)/mortgage(s)/line(s) of credit, and any other parties with whom we propose to have a financial relationship. If there is more than one applicant, you also agree that we may collect, use and disclose personal information about each of you, from the other, for the purposes listed above. You also agree that if a mortgage default insurer is assigned to your application, such mortgage default insurer may obtain personal information about you from a credit reporting agency from time to time, and may use such information for any purpose related to the mortgage default insurance in connection with your application. You agree that the approval or granting of any mortgage by a lender to you, with or without mortgage default insurance, is not to be construed or relied on by you as representing the value or condition of any underlying security, or that it confirms that you have the ability to repay the mortgage debt.

If you do not wish to receive any information on any other products offered or approved by us; or information about any other products offered or approved by us, our affiliates, related entities, or other third party financial partners, please initial the box below.

NO, you may not send me any information on other products.

By signing this form, you also agree that Educators Financial Group Inc. and your independent Mortgage Agent may use and retain your personal information for the foregoing purposes for 7 years after the later of a) the date of your latest application to us, and b) the date that all of your loans/mortgages contracted through us have expired or were terminated. For more information, see our privacy policy at www.educatorsfinancialgroup.ca, or contact our compliance officer at 1.800.263.9541.

Furthermore, by signing this form, you acknowledge that Educators Financial Group Inc. and your independent Mortgage Agent may receive fees or program incentives from a lender (including money, points, goods, or services) which can vary by the amount, type, terms, and interest rate of the mortgage originated through Educators Financial Group Inc., and your independent Mortgage Agent.

I (we), the undersigned, have read and understand the above, and confirm that the information given in this application is true and correct:

Applicant Signature

Co-Applicant Signature

Applicant Name (Print)

Date

Co-Applicant Name (Print)

Date

Broker license 12185

#0113

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www.educatorsfinancialgroup.ca