MORTGAGE DOCUMENT CHECKLIST

TO MAKE THE HOME-BUYING PROCESS EASIER, GET YOUR DOCUMENTS READY FOR YOUR MORTGAGE APPLICATION. HERE'S A CHECKLIST TO HELP YOU ORGANIZE THE ESSENTIAL PAPERWORK. REMEMBER, YOU MIGHT NEED TO PROVIDE A BIT MORE INFORMATION LATER ON.

INCOME



EMPLOYEES: RECENT LETTER OF EMPLOYMENT (DATED WITHIN 30 DAYS) AND PAYSTUB (DATED WITHIN 30 DAYS).

VARIABLE INCOME (HOURLY, COMMISSION, ETC.): TWO MOST RECENT T4 STATEMENTS IN ADDITION TO YOUR LETTER AND PAY STUB

CORPORATION OWNERS: LATEST NOA, 2-YEAR T1 GENERALS, AND TWO YEARS OF FINANCIAL STATEMENTS FROM AN ACCOUNTANT.

YOUR **CRA DOCUMENTS**, LIKE YOUR NOTICE OF ASSESSMENT, STATEMENT OF ACCOUNT AND T1 GENERALS CAN ALL BE DOWNLOADED FROM YOUR **CRA ACCOUNT**:



STEPHENGREEN

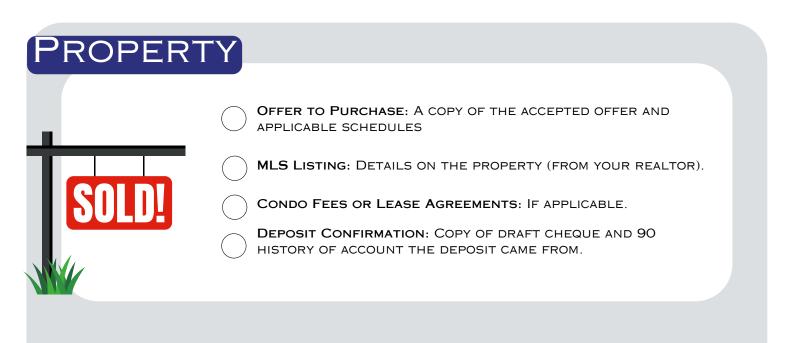
DOWN PAYMENT



ACCOUNT HISTORY: PROVIDE 90-DAY STATEMENTS SHOWING YOUR ACCUMULATED DOWN PAYMENT FROM EACH ACCOUNT CONTRIBUTING TO IT, ENSURING BOTH YOUR NAME AND ACCOUNT NUMBER ARE VISIBLE. ANY LARGE DEPOSITS OVER \$2,500 WILL NEED TO BE VERIFIED, ALONG WITH A 90-DAY HISTORY FOR THE ACCOUNT FROM WHICH THE FUNDS ORIGINATED.

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LABEL FILES CLEARLY: USE CLEAR AND DESCRIPTIVE FILE NAMES, SUCH AS "MARY_ 2023_TAX_RETURNS" OR "PAUL_ 2023_BANK_STATEMENTS," TO MAKE SEARCHING FOR DOCUMENTS QUICK AND EFFICIENT.



BANKING AND ID



VOID CHEQUE OR BANK-STAMPED PRE-AUTHORIZED DEBIT FORM.

) **ID:** YOU WILL NEED PIECE OF VALID GOVERNMENT-ISSUED ID.

LINK TO OUR FULL DOCUMENT SUPPORT WEBSITE THEFINANCIALCOLLECTIVE.CA/DOCS



STEPHENGREEN -MORTGAGES-----