



"Your Real Estate and Investment Advisors"

PROPERTY ADDRESS: \_\_\_\_\_

**Refinance Details:**

When did you purchase this house? (month/year) \_\_\_\_\_

What was the original purchase price? \_\_\_\_\_

What was the original mortgage amount? \_\_\_\_\_

Which Lender currently holds the mortgage? \_\_\_\_\_

What is the current balance of the mortgage? \_\_\_\_\_

Was this home insured as a high ratio with CMHC or GE? \_\_\_\_\_

What is the estimated value now? \_\_\_\_\_

What are the condo fees? \_\_\_\_\_

What are the mortgage payment, rate, amortization and maturity date? \_\_\_\_\_

**Property Details:**

Is this a rental? \_\_\_\_\_

Rental Income per unit? \_\_\_\_\_

Bedroom Format: 1 bdrm, 2 bdrm ect....How many of each? \_\_\_\_\_

Do tenants pay utilities? If not, please list cost \_\_\_\_\_

What are the yearly property taxes? \_\_\_\_\_

What is the approximate square footage of the interior? (not including the basement) \_\_\_\_\_

What is the approximate age of the property? \_\_\_\_\_

Style of home (example two story, bungalow) \_\_\_\_\_

Type of home (example detached, semi, townhouse) \_\_\_\_\_

Details of any garage on the property (example attached, detached, single or double) \_\_\_\_\_

What is the lot size? \_\_\_\_\_

What is the legal description of the property? (Example lot and plan no.) \_\_\_\_\_

What is heat source? (example: forced air/electric base board/radiant) \_\_\_\_\_

What is the water source? (municipal/well water/water tank) \_\_\_\_\_

Municipal Sewage/storage tank/septic tank \_\_\_\_\_

Have you done any improvements to the property since you have owned it? \_\_\_\_\_

Please list them here and costs associated with the renovations: \_\_\_\_\_

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
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