

CLOSING

File complete — documents to instruct

Purchase and refinance. Nothing is instructed until this list is complete. Send it in one package rather than in pieces.

FILE

BORROWER(S)

PROPERTY ADDRESS

LENDMAX FILE #

POSITION

CLOSING DATE

BROKER

REQUIRED TO INSTRUCT

- | | |
|---|--|
| ☐ Signed commitment | ☐ Appraisal redirection |
| ☐ Purchase agreement | ☐ Current mortgage statement |
| ☐ Proof of deposit and down payment | ☐ Property tax bill |
| ☐ Two pieces of ID for each borrower | ☐ Void cheque |
| ☐ ID verification | ☐ Borrower lawyer information |
| ☐ Pre-authorized debit, signed | ☐ Broker disclosure to borrower |

BORROWER LAWYER

FIRM

LAWYER

PHONE

EMAIL

ADDRESS

PROCESS

1. Application, credit report and appraisal received for review.
2. Pricing offered by email. A non-refundable admin fee is required to proceed — \$500 on a second mortgage, \$1,000 on a first mortgage.
3. On receipt of the admin fee the approval expiration is set at 48 hours and the commitment is issued.
4. Once all conditions are complete the file is instructed for closing in 3 to 7 business days.

Rush files carry an additional admin fee of \$500. Same-day instructions with next-day funds are \$1,000, and the file must be broker complete before it can be instructed.

SIGNATURES

BROKER — SIGNATURE

PRINT NAME

DATE