



Documentation

Please see below, a list of the documents we need to support your file. Please select the items that apply to your situation.

For traditionally employed or retired individuals, please send copies of the following:

- 2019 and 2018 income T-slips (for all sources of income)
- 2018 and 2017 Notice of Assessments (if 2019 is available, please omit 2017)
- Two most recent pay stubs
- Two valid forms of photo identification (please do not send Provincial Health cards)
- Three most recent months bank statements showing proof of funds (for purchases)
- Lease agreements (for rental properties owned)
- Mortgage statements (for all properties owned – for purchases and refinances)
- Broker MLS (for purchases)
- Accepted Purchase Sale Agreement (for purchases)

For self-employed individuals we need the above documents (as applicable) plus the following:

- 2018 and 2017 full T-1 generals including Statement of Business Activity (if 2019 is available, please omit 2017)
- 2018 and 2017 Notice of Assessments (if 2019 is available, please omit 2017)
- Articles of Incorporation including Shareholder Distribution (for Incorporation)
- Business License or HST License (if applicable)
- Most recently Accountant prepared financials (for Incorporation)

We do not need everything all at once! You can send the easy stuff first. We would prefer to have pay stubs and identification as soon as possible.

Please contact us if you would like us to set up a secure Dropbox or Google Drive for you to upload your documents. Please send your request to Info@TheMortgageGuyNiagara.com.

Thanks!