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**REAL ESTATE QUESTIONNAIRE**

**CONTACT INFORMATION**

NAME: \_\_\_\_\_

CURRENT ADDRESS: \_\_\_\_\_

TELEPHONE NUMBERS:

HOME: \_\_\_\_\_ WORK: \_\_\_\_\_ CELL: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

EMPLOYER'S NAME: \_\_\_\_\_

EMPLOYER'S ADDRESS: \_\_\_\_\_

ARE YOU MARRIED?  YES  NO  SEPARATED

IF YES, PROVIDE SPOUSE'S FULL LEGAL NAME AND DATE OF BIRTH EVEN IF YOU ARE SEPARATED:

SPOUSE'S NAME: \_\_\_\_\_

SPOUSE'S DATE OF BIRTH: \_\_\_\_\_

DID YOU USE A REAL ESTATE AGENT TO SELL/PURCHASE YOUR PROPERTY?  YES  NO

IF YES, PLEASE PROVIDE CONTACT INFORMATION:

NAME OF AGENT: \_\_\_\_\_

TELEPHONE NUMBERS:

WORK: \_\_\_\_\_ CELL: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

WILL YOU BE AVAILABLE ON THE DAY OF CLOSING?  YES  NO

CLOSING DATE: \_\_\_\_\_

**\*\*IF YOU ARE SELLING YOUR PROPERTY, COMPLETE PART A.\*\***

**\*\*IF YOU ARE BUYING A PROPERTY, COMPLETE PART B.\*\***

**PART A TO BE COMPLETED IF YOU ARE THE VENDOR (SELLING A PROPERTY)**

**FULL LEGAL NAME (INCLUDING MIDDLE NAME(S)) AND DATE OF BIRTH OF ALL PERSONS CURRENTLY ON TITLE:**

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**PLEASE PROVIDE A COPY OF THE FRONT AND BACK OF TWO OF THE FOLLOWING FOR EACH PERSON AND SPOUSE:**

**ONTARIO DRIVER'S LICENSE**

**SOCIAL INSURANCE CARD**

**PASSPORT (IF NOT CANADIAN, DOCUMENT MUST BE IN EITHER ENGLISH OR FRENCH**

**PERMANENT RESIDENT CARD**

IF ONLY ONE OF THE ABOVE DOCUMENTS IS AVAILABLE, A CHARTERED BANK CREDIT CARD MAY BE SUBSTITUTED FOR THE SECOND PIECE OF IDENTIFICATION. ALL IDENTIFICATION MUST BE CURRENT/VALID. IF YOU DO NOT HAVE THE FACILITY TO CREATE A LEGIBLE REPRODUCTION OF YOUR IDENTIFICATION, PLEASE BRING THE ORIGINAL DOCUMENTS TO OUR OFFICE, AND WE WILL SCAN THEM FOR YOU.

**DID YOU USE THE PROPERTY AS:**  PRIMARY RESIDENCE  VACATION RESIDENCE  RENTAL

**IF USED AS A RENTAL, ARE THERE TENANTS TO BE ASSUMED?**  YES  NO

**IF YES, PLEASE PROVIDE COPY OF LEASE OR RENTAL AGREEMENT**

**IF YOU HAVE SURVIVED YOUR SPOUSE (I.E. YOUR SPOUSE HAS DIED) HAS THEIR NAME BEEN TAKEN OFF TITLE?**  YES  NO  N/A

**IS THERE A SURVEY OF YOUR PROPERTY IN EXISTENCE?**  YES  NO

**IF YES, PLEASE PROVIDE COPY.**

**PLEASE PROVIDE A COPY OF THE MOST RECENT YEAR'S FINAL PROPERTY TAX BILL AND CURRENT INTERIM TAX BILL IF AVAILABLE.**

**IS THE PROPERTY CURRENTLY SEVICED BY:**  MUNICIPAL SERVICES  WELL/SEPTIC

**IF ON WELL/SEPTIC, HAS A BACTERIAL ANALYSIS BEEN COMPLETED?**  YES  NO

**PLEASE PROVIDE US WITH A COPY OF THE SEPTIC PERMIT AND BACTERIAL ANALYSIS.**

**NEW ADDRESS FOR SERVICE:** \_\_\_\_\_

**PART A CONTINUED**

**IS THE PROPERTY CURRENTLY MORTGAGED OR SECURED AGAINST A LINE OF CREDIT?**  YES  NO

**IF YES, PLEASE PROVIDE THE MORTGAGE INSTITUTION'S NAME(S) AND MORTGAGE NUMBER(S) OR SECURED LINE OF CREDIT NUMBER:**

**1<sup>ST</sup> MORTGAGE:**

**NAME:** \_\_\_\_\_ **ACCOUNT #:** \_\_\_\_\_

**2<sup>ND</sup> MORTGAGE:**

**NAME:** \_\_\_\_\_ **ACCOUNT #:** \_\_\_\_\_

**3<sup>RD</sup> MORTGAGE:**

**NAME:** \_\_\_\_\_ **ACCOUNT #:** \_\_\_\_\_

**1<sup>ST</sup> LINE OF CREDIT:**

**NAME:** \_\_\_\_\_ **ACCOUNT #:** \_\_\_\_\_

**2<sup>ND</sup> LINE OF CREDIT:**

**NAME:** \_\_\_\_\_ **ACCOUNT #:** \_\_\_\_\_

**IF YOU WOULD LIKE US TO DEPOSIT THE PROCEEDS OF SALE INTO YOUR BANK ACCOUNT, PLEASE PROVIDE A COPY OF A CHEQUE MARKED "VOID" FOR AN ACCOUNT IN THE NAME OF EACH PERSON ON TITLE.**

**PART B** TO BE COMPLETED IF YOU ARE THE **PURCHASER** (BUYING A PROPERTY) OR **REFINANCING**.

**FULL LEGAL NAME (INCLUDING MIDDLE NAME(S)) AND DATE OF BIRTH OF ALL PERSONS TO BE REGISTERED ON TITLE:**

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**NAME:** \_\_\_\_\_ **DoB:** \_\_\_\_\_

**PLEASE PROVIDE A COPY OF THE FRONT AND BACK OF TWO OF THE FOLLOWING FOR EACH PERSON AND SPOUSE:**

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**WILL YOU USE THIS PROPERTY AS:**  PRIMARY RESIDENCE  VACATION RESIDENCE  RENTAL

**IF USED AS A RENTAL, ARE THERE TENANTS TO BE ASSUMED?**  YES  NO

**HAVE YOU OR THE PERSON TO WHOM YOU ARE LEGALLY MARRIED EVER OWNED PROPERTY ANYWHERE IN THE WORLD?**  YES  NO

**INSURANCE**

**INSURANCE COMPANY'S NAME:** \_\_\_\_\_

**POLICY NUMBER:** \_\_\_\_\_

**INSURANCE AGENT/BROKER'S NAME:** \_\_\_\_\_ **TEL #:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

**PART B CONTINUED**

**MORTGAGE**

**WILL YOU BE OBTAINING A MORTGAGE OR SECURED LINE OF CREDIT ON THE NEW PROPERTY?**

YES  NO

**IF YES, PLEASE PROVIDE FOLLOWING:**

**MORTGAGE INSTITUTION'S NAME:** \_\_\_\_\_

**REPRESENTATIVE'S NAME:** \_\_\_\_\_

**DIRECT PHONE NUMBER:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_