Refinance Questionnaire

Please complete this questionnaire once your lender has approved your new mortgage. It helps us prepare your documents and pay out existing debts on the funding date.

How to complete: type your answers into the white boxes and tick the boxes that apply. Leave anything you are unsure of blank and we will go through it together. Save the PDF and upload it to your secure folder link.

Our file number (if known)	

THE PROPERTY

Property address	
Type (house, strata condo, townhouse, other)	
Funding date requested by your lender	

OWNERS

Please complete one column for each owner on title.

	Owner 1	Owner 2
Full legal name (as on ID)		
Date of birth		
Occupation and employer		
Current home address		
Mobile phone		
Email		
Canadian citizen, permanent resident or other?		

Will anyone be added to or removed from title as part of this refinance?	☐ Yes	☐ No
Is the property your principal residence?	☐ Yes	☐ No

NEW MORTGAGE

New lender	
Mortgage broker (name, company, phone, email)	
New mortgage amount	
Purpose of the refinance (renovation, consolidation, purchase, other)	

DEBTS TO BE PAID OUT

List any mortgage, line of credit or other debt to be paid from the new mortgage. Give only the last four digits of any account number.

	Debt 1	Debt 2	Debt 3
Lender or creditor			
Type of debt			
Last 4 digits of account			
Approximate balance			

INSURANCE

Home insurance agent (name, phone, email)	

DOCUMENTS TO UPLOAD

Please upload these to the secure folder link we sent you. Please do not send identification by email.

- ☐ Mortgage commitment or approval letter
- ☐ Statements for every debt being paid out
- ☐ Most recent property tax notice
- ☐ Home insurance details
- ☐ Copies of two pieces of ID for each owner (originals are checked in person)

ANYTHING ELSE WE SHOULD KNOW

Questions, special circumstances or deadlines	

DECLARATION AND CONSENT

I confirm the information in this questionnaire is true and complete to the best of my knowledge. I consent to Tanvi Ahuja Notary Corporation (Hummingbird Notaries) collecting, using and disclosing this information to provide the services I have requested and to meet its legal and professional obligations, as described in its Privacy Policy at notaryinbc.com/privacy-policy.

Two pieces of valid identification, at least one of which is current government-issued photo identification, will be verified in person at your appointment.

Name	
Date	

This questionnaire collects information for your file. It is not legal advice, and it does not create a notary-client relationship until we confirm your engagement in writing.