

MERITLINE CHECKLIST

MEMBER(S) _____

APPOINTMENT DATE + TIME _____

We're looking forward to getting to know you and getting a better understanding of how we can help you achieve your goals. To make the most of our time together, please gather the below documents and additional information to bring to our meeting.

INCOME

Please bring two pieces of the following documents to confirm your current employment status & earnings.

EMPLOYED/RETIRED

- ☐ Two most recent Paystub and T4
- ☐ Letter of Employment on Letter Head
- ☐ For variable income (Commissioned, Overtime, Bonused, Part-Time Employment, Investment Statements, T4RIF Legal Agreement for support or alimony payments)
- ☐ Most recent two years T1 General and Notice of Assessment
- ☐ Pensions: T4A OAS, T4A(P) CPP, T5007 WSIB and Workers Compensation
- ☐ EI – Mat Leave (Letter from Employer with Return Date)

SELF-EMPLOYED/INVESTMENT PROPERTY

- ☐ Most recent two years T1 Generals (Personal & Business)
- ☐ Two years Notice of Assessment from Canada Revenue Agency
- ☐ Two years current Business Financial Statements (full package)
- ☐ Signed up to date Lease Agreements

ADDITIONAL DOCUMENTATION TO BRING IN:

Supporting documentation for your Meritline application (if applicable).

- ☐ Most Recent MPAC Property Value Assessment for Real estate estimated values www.mpac.ca
- ☐ Up to date Property Tax Statement
- ☐ Proof of Down Payment (if applicable)
- ☐ Registered Charge (if applicable to 2nd position to other FI)
- ☐ Mortgage of Land, Deed
- ☐ Financial Institution Mortgage Statement (If applicable)
- ☐ Lease Agreement (If applicable)
- ☐ Solicitor Contact Information
- ☐ Condominium: Proof condo fees Up To Date and Certificate of Insurance for condo Corporation & Status Certificate
- ☐ Purchase and Sale Agreement
- ☐ Listing
- ☐ Waivers

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Additional documents may be requested.

Bring your documents to complete your application with your FirstOntario Representative.

If you have questions about the required documents, please call your local branch at 1-800-616-8878.

This sheet is for information purposes only and does not signify formal approval.

REPRESENTATIVE: _____

BRANCH ADDRESS: _____

PHONE NUMBER: _____

ADDITIONAL NOTES: _____