

# Sidhu and Associates


NOTARIAL SERVICES AND REAL ESTATE  
CONSULTING



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## Mortgage - Client Information Sheet


Name of Person Filling out instructions: \_\_\_\_\_ on the \_\_\_\_\_ Day  
of \_\_\_\_\_, 20\_\_\_\_. Are we acting for Lender or Borrower ? \_\_\_\_\_

 Once we have received mortgage instructions from \_\_\_\_\_  
(Please fill in name of Financial institution that you are dealing with) and we have received  
a title and tax search we will call you to set up an appointment to sign the appropriate  
mortgage documents.

Confirm current address:


Confirm Occupation(s) of All borrowers:

Telephone #'s: Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_

 Will the borrowers be available to sign documents ( going on vacation, work schedule  
conflicts, moving out of city/province)

 Name of Insurance Agent: \_\_\_\_\_

Do you Have a Site Survey:                      Y        N

 If there is no completion date specified, if not, what date would you like to complete  
the mortgage.

**Other Notes:**

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