

GET READY FOR YOUR loan and line of credit meeting

Your lending meeting is a great opportunity to ask us questions and explore your loan and line of credit options. During this meeting, we'll work together to explore your borrowing options and find the solution that best supports your goals.

Here is what you'll need to bring to your meeting

2 PIECES OF LEGAL, GOVERNMENT-ISSUED ID (must choose 1 ID from List A)		
LIST A (Primary ID sources)	LIST B (Secondary ID sources)	
<input type="checkbox"/> Canadian or foreign passport <i>(preferred, as we require your full legal name)</i>	<input type="checkbox"/> Birth certificate <i>(preferred)</i>	<input type="checkbox"/> Nexus/FAST global entry card
<input type="checkbox"/> Driver's license <i>(Canadian or foreign)</i>	<input type="checkbox"/> Citizenship card <i>(issued prior to 2012)</i>	<input type="checkbox"/> Metis/treaty card
<input type="checkbox"/> Permanent resident card	<input type="checkbox"/> Record of Landing or visitor record	<input type="checkbox"/> Fire arms license
<input type="checkbox"/> Secure Certificate of Indian Status	<input type="checkbox"/> Work or study permit	<input type="checkbox"/> Major Canadian credit card <i>(we do not accept credit cards from 'virtual banks' or store credit cards)</i>
<input type="checkbox"/> Citizenship card <i>(issued prior to 2012)</i>	<input type="checkbox"/> Temporary Resident Permit or Confirmation of Permanent Residence	
<input type="checkbox"/> Enhanced ID		

PROOF OF INCOME	LIST OF LIABILITIES
<input type="checkbox"/> 2 recent paystubs	<input type="checkbox"/> Existing mortgages
<input type="checkbox"/> Most recent T4	<input type="checkbox"/> Balance of mortgage and monthly payment
<input type="checkbox"/> T1 General <i>(personal tax return)</i>	<input type="checkbox"/> Property tax amount
<i>If you are self-employed, you'll need to bring 2 years of Personal Income Tax Returns and Financial Statements.</i>	<input type="checkbox"/> Credit card balances
	<input type="checkbox"/> Car loans
	<input type="checkbox"/> Lines of credit
	<input type="checkbox"/> Cosigned or guaranteed loans
	<input type="checkbox"/> Student loans
	<input type="checkbox"/> Child support payments
	<input type="checkbox"/> Spousal support payments

LIST OF ASSETS
<input type="checkbox"/> Vehicles <i>(year, make, model)</i>
<input type="checkbox"/> Recreational vehicles
<input type="checkbox"/> Investments
<input type="checkbox"/> RRSP/TFSA
<input type="checkbox"/> Owned property
<input type="checkbox"/> Other real estate holdings