

# Self-Administered RRSP Mortgage Need To Know Worksheet

Date: \_\_\_\_\_

A. Who Is Requesting The Mortgage? \_\_\_\_\_

i. Contact Person's Name: \_\_\_\_\_

ii. Address: \_\_\_\_\_

iii. Telephone #: \_\_\_\_\_

iv. Fax #: \_\_\_\_\_

B. What Is Being Offered As Security:

i. Lot: \_\_\_\_\_

ii. Block: \_\_\_\_\_

iii. Plan: \_\_\_\_\_

iv. Unit #: \_\_\_\_\_

v. Municipal Address:

\_\_\_\_\_

C. What is the Mortgage Amount Being Requested?

\_\_\_\_\_

D. Who Is The RRSP Trustee?

i. Financial Institution: \_\_\_\_\_

ii. Address: \_\_\_\_\_

iii. Contact Person: \_\_\_\_\_

iv. Telephone #: \_\_\_\_\_

v. Fax #: \_\_\_\_\_

E. What Interest Rate & Terms Are Being Offered:

**F. What Date Is The Loan To Be Advanced:**

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## G. How Much Are The Monthly Payments?

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## H. When Is The First Payment?

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## I. When Is The Loan Due?

## K. Who Is Your Solicitor?

i. Lawyer's Name:

ii. Assistant's Name:

iii. Law Firm:

#### iv Address:

v. Telephone #:

vi Fax #:

## Additional Notes: