

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:

G. How Much Are The Monthly Payments?

H. When Is The First Payment?

I. When Is The Loan Due?

J. What is the Loan to Value Ratio (including the new financing)?

K. Who Is Your Solicitor?

i. Lawyer's Name: _____

ii. Assistant's Name: _____

iii. Law Firm: _____

iv. Address: _____

v. Telephone #: _____

vi. Fax #: _____

Additional Notes:

