



MORTGAGE BORROWER'S CHECKLIST

UPON LENDER APPROVAL:

- Advise your mortgage banker/broker you will be working with Marpole Notary
- Complete our online Property File Starter to get a better idea of what we will need from you, save time when the file is opened, and communicate your information accurately
- Consult with your existing mortgage lender, if any, for strategies to mitigate any possible early payout penalties (eg. exercising prepayment privileges, etc.)
- Alert your insurance agent if changing mortgage lender
- *Corporations* ensure that documentation are in good standing at the appropriate registries and connect us with your corporate solicitor
- If executing by *Power of Attorney*, ensure lender has approved it for use with their mortgage documents and provide us with the original for filing with the LTSA

ABOUT TWO-THREE WEEKS PRIOR TO FUNDING:

- Expect to hear from us to exchange particulars and book your in-person signing appointment at our office for just ahead of funding
- Expect to receive emailed introductory confirmation/information from our conveyancing team
- Contact us along the way with any questions or new developments

WITHIN A FEW DAYS OF FUNDING:

- Expect to receive emailed preview of documents/instructions from our conveyancing team
- Attend at signing appointment to execute the required mortgage documents (bring two pieces of identification, at least one being current government-issued photo ID and possibly a VOID cheque/PAD form as may be requested by lender)
- Direct how you would prefer to receive mortgage proceeds (collected from us, deposited locally by us, couriered, wired, etc.)

FUNDING:

- Mortgage documents are submitted to the LTSA and funds are received by us from your lender
- Mortgage proceeds are distributed same or next business day, depending on time of funding

POST-TRANSACTION REPORTING:

- Expect to receive emailed confirmation of registration/funding and copies of documents for your file
- Expect to receive a State of Title Certificate to close the matter within 1-2 months
- Tell your Broker and friends what a positive and efficient experience you enjoyed with us!

YOUR NEXT PROPERTY TRANSACTION OR FOR PERSONAL PLANNING DOCUMENTS:

- We look forward to working with you again :)