**Know Your Client Template | Purchase**

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| Client Name(s): | Click or tap here to enter text. |
| Funds Available for Down Payment: | Click or tap here to enter text. |
| Down Payment Source(s): *(Ex. Savings, RRSPs, gift, etc)* | Click or tap here to enter text. |
| Property: Owner-Occupied or Rental? | Choose an item. |
| Requested Purchase Price Range: | Click or tap here to enter text. |
| Current Credit Score: *(if known)* | Click or tap here to enter text. |
| First-Time Home Buyer (Y/N): | Choose an item. |
| Annual Combined Income (Approximately): | Click or tap here to enter text. |

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| **Questions to Ask** | **Client Response** |
| Do you understand the difference between a mortgage amortization and term? | Choose an item. |
| Do you understand the difference between a closed and open term mortgage? | Choose an item. |
| Do you plan on selling this home in the next 5 years? | Choose an item. |
| Are you interested in a variable or fixed mortgage rate? | Choose an item. |
| What is your approximately monthly budget for a mortgage payment? | Click or tap here to enter text. |
| Are you looking to make a lump sum payment on your mortgage each year? | Choose an item. |
| Do you have any debt? (LOC, Loans, Car payments, etc.) | Choose an item. |
| Are you aware of the closing costs associated with a purchase? Do you have these funds? | Choose an item. |
| Are you aware of what mortgage insurance is? | Choose an item. |
| **IF YOU ARE NOT A FIRST-TIME HOME BUYER, PLEASE ANSWER BELOW** | |
| How many properties do you own? | Choose an item. |
| Are any of these properties’ rentals? (If so, how many?) | Choose an item. Choose an item. |
| **IF RENTAL:** What is your monthly rental income? | Click or tap here to enter text. |
| Please list your outstanding mortgage balances, the payment, payment frequency, and rate: | Click or tap here to enter text. |

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| **Initial Documents Requested** | **Received** |
| Income Documents |  |
| Purchase + Sale Agreement with MLS Listing |  |
| Photo ID |  |
| Signed Client Consent Form |  |
| Mortgage Application |  |