**MORTGAGE**

**INSTRUCTIONS**

TO: JAY CHAUHAN   
 Barrister and Solicitor   
 330 Highway 7 East, Suite 309   
 Richmond Hill, Ontario   
 L4B 3P8   
 Telephone: (905) 771-1235   
 Facsimile: (905) 771-1237   
 Email: jay@jaychauhan.com

Please complete the following information and send it to us as soon as possible by fax if possible and if not, by telephone call:

1. Your name and address and telephone numbers:

Name:  
Address:  
  
  
Office Telephone Number:  
Home Telephone Number:  
Email Address:

2. Name and address of lending institution:

Name:  
Address:

Telephone Number:  
Name of Contact Person:

3. Date funds are required:

4. Are funds required for building or construction or home improvement?  
Yes\_\_\_\_\_\_\_\_ No\_\_\_\_\_\_\_\_

5. Is this new mortgage 1st or 2nd? 1st\_\_\_\_\_\_\_\_ 2nd\_\_\_\_\_\_\_\_ 3rd\_\_\_\_\_\_\_\_

6. Names, addresses, telephone numbers, and mortgage numbers of existing mortgage (lenders) and the approximate amounts of the outstanding balances:

Name of 1st Mortgagee:  
Address:  
  
  
Approximate outstanding amount:

Name of 2nd Mortgagee:  
Address:  
  
  
Approximate outstanding amount:

7. Are any of the above existing mortgages being discharged?  
Yes\_\_\_\_\_\_\_\_ No\_\_\_\_\_\_\_\_

Name of mortgage being discharged:

8. Name, address, and telephone number of the insurance agent:  
(Please ask them to issue binder number. For the new mortgagee and have them fax it to us.)

Name of your insurance broker:  
Address of your broker:  
  
  
Telephone number:  
Fax number:

9. We need the following documents:  
(Please bring in the report we sent to you previously. We will return it to you after this mortgage is completed.)

1. Deed/Transfer

2. Copies of existing mortgages (and the mortgage number and address of the bank)

3. Building location survey showing the location of the building on the lot. It should be legible and distances marked in readable form.

4. Recent tax bills and receipts for payments made by you.

5. Particulars of liens or easements on property.

1. Report of Solicitor when you bought the property.
2. Borrower’s background and identification:
   1. Are you a Canadian Citizen?
   2. How long have you lived at your current address?
   3. When did you acquire the property that is being mortgaged?
   4. Do you have other properties?
   5. Who is your mortgage broker?
   6. Who referred us as lawyer to you?

11. Solicitor’s instructions

Please bring in the solicitor’s instructions personally, if you can, from the lender. Please do not rely on the bank to arrange to send it to us.

I understand that this document has been developed for the purpose of organizing the information necessary for my matter. I understand that by filling out this form I have not retained your services. Until I have signed a Retainer Agreement pursuant to the above matter, the Law Office of Jay Chauhan is not obliged to advise or act on my matter. I understand that I can send this document by fax, email or other means but **only** if instructed to do so by your office. I understand that some of the information contained may be confidential, and should I send this to your office without instruction to do so, I cannot hold you liable by any means.