

Client Intake

Residential Property Sale



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Date: _____

Please complete all questions that apply to you. We expect to receive your completed form at least one week prior to the requisition date in your Agreement of Purchase and Sale.

Returning Client? Yes No: How did you hear about us?: _____

Personal Information

- Property Ownership:** Sole Registered Owner
- Joint tenants, total number of owners: _____
- Tenants in common, total number of owners and ownership percentage

- Other, please specify: _____

Please complete the questions below for each person named on the title to the property. Shortly before the closing date, each of you will be asked to bring **TWO** unexpired original government issued photo IDs for signing closing documents.

Fist Seller's Full Name: _____
(include middle names and alternate names, if any)

Date of Birth: _____ Citizenship: _____

Photo IDs: Driver's license Passport Birth certificate Citizenship card PR card

Marital Status: Single Married Separated Divorced Common law Widowed

If married, are you married to the other seller? Yes No

Current Address: _____
(street, apt. no., city, province, postal code)

Home Phone: _____ Cell Phone: _____

Work Phone: _____ Fax: _____

Email: _____ Preferred Method of Contact: _____

Job Title: _____ Employer: _____

Address after Closing: _____
(street, apt. no., city, province, postal code)

Second Seller's Full Name: _____

(include middle names and alternate names, if any)

Date of Birth: _____

Citizenship: _____

Photo IDs: Driver's license Passport Birth certificate Citizenship card PR card

Marital Status: Single Married Separated Divorced Common law Widowed

If married, are you married to the other seller? Yes No

Current Address: _____

Same as first seller (street, apt. no., city, province, postal code)

Home Phone: _____

Cell Phone: _____

Work Phone: _____

Fax: _____

Email: _____

Preferred Method of Contact: _____

Job Title: _____

Employer: _____

Address after Closing: _____

Same as first seller (street, apt. no., city, province, postal code)

Agreement of Purchase and Sale

Property Address: _____

Sale Price (\$): _____

Legal Description: _____

Closing Date: _____

Requisition Date (Title Search): _____

The Property

Property Type: Freehold

Freehold having common elements with common expense (\$): _____

Condo with monthly condo fees (\$): _____

Condo Management's Name: _____

Address: _____

Telephone: _____

Fax: _____

Email: _____

You used the property as: Matrimonial home Principal residence Rental property
 Other, please specify: _____

Real Estate Agent

Full Name: _____

Address: _____

Telephone: _____ Fax: _____ Email: _____

Buyer's Lawyer

Names of Lawyer and/or Law Firm: _____

Address: _____

Telephone: _____ Fax: _____

Mortgage/Line-of-credit Particulars

How many mortgages and/or line of credits do you have on your property?: _____

Please complete the questions for each mortgage and/or line of credit registered on the property.

First Loan Ref Number: _____

Institution's Name: _____

Institution's Address: _____

Contact Person: _____

Telephone: _____ Fax: _____

Second Loan Ref Number: _____

Institution's Name: _____

Institution's Address: _____

Contact Person: _____

Telephone: _____ Fax: _____

Taxes

Please provide us a copy of your last tax bill. If you are on a payment plan, please contact the City to cancel the plan and pay the outstanding balance immediately. If the property tax is not yet available for the current year, please complete the questions for the previous year.

Assessment Roll No.: _____

Total Property Tax for year 20____ is (\$)____. Interim Final

Total Property Tax Paid (\$): _____ Next Tax Instalment Due Date: _____

Are taxes paid through mortgage institution? No Yes

Institution's Name: _____

Address: _____

Telephone: _____ Fax: _____

Utilities

You shall notify service providers in advance to arrange final meter readings. For water, please contact the City of Ottawa at least 21 days prior to the closing date. For hydro and gas, please visit the websites of Hydro Ottawa and Enbridge to fill out online forms at least 10 business days prior to the closing date. If you have an oil tank, please keep it filled on the closing day.

Heating: Gas Electric Oil, the total cost of filling the oil tank is (\$): _____

Oil tank capacity in litres: _____ Oil Price per litre (\$): _____

Other Interested Parties

1. Have any of you been sued or was there any judgements against you? No Yes

Writ or Court File No: _____

2. Are there any persons and/or creditors other than the mortgagee(s) who may have an interest on this property? No Yes

Creditor's Full Name: _____

Creditor's Address: _____

Contact Person: _____

Telephone: _____ Fax: _____

3. Are any of you bankrupted? No Yes, which of you?: _____
Bankruptcy Trustee's Name: No Yes
Bankruptcy Trustee's Address: _____
Telephone: _____ Fax: _____

Documents

In addition to your last property tax bill, please provide the following documents, if available:

- Deed/Transfer Survey
- The report and documents from lawyer when you bought the property.

More

If you need more space for any section, please print out below.

Please print and sign your name above.

Date of Signature