

## Client Document Checklist

Once your application is conditionally approved, Equitable Bank will provide you with a Commitment Letter to review and sign. The Commitment Letter will highlight additional documents and conditions that must be provided or satisfied prior to funding. Below is a list of the common documents requested.

Should you have any questions about the application process, please contact your Equitable Bank representative.

<b>Subject Property Information</b>	<input type="checkbox"/> Most recent property tax bill confirming ownership, address, and annual tax amount <input type="checkbox"/> Most recent mortgage, Home Equity Line of Credit (HELOC) or Home Equity Loan statement (if you have debt secured against your residence)*
<b>Income Information</b>	<b>Income verification (if required):</b> <input type="checkbox"/> T4A slip(s) confirming CPP, OAS or other pension income <b>OR</b> <input type="checkbox"/> One month bank statement confirming pension deposits*
<b>Identification</b>	<input type="checkbox"/> One piece of a valid (non-expired) government-issued photo identification** (ID must be original and legible)

### Additional Tips

- Proof of annual condo fees may be required.
- Fire insurance policy will be required by your lawyer at funding.
- Equitable Bank credit reserves the right to request further documentation to support ability to pay property expenses. Salaried, Business-for-self, and Private Pension applicants may require supporting income documentation.

\* All mortgage, HELOC and Home Equity loan statements, and bank statements, must be bank issued with all pages included and unredacted. Screenshots are not accepted.

\*\* Health cards from Ontario cannot be used to fulfill Identification requirements.