

Unsurpassed.

Mortgage Agent Application



BROKER OFFICE INFORMATION				
Business Name				
Street Number		Street Name		Street Type
Street Direction		Unit #		Unit Type
City		Province		Postal Code
Phone		Fax		
Principal Contact		Position		

AGENT INFORMATION				
Last Name <small>Note: Please include full legal name</small>		First Name		Middle Name
Street Number		Street Name		Street Type
Street Direction		Unit #		Unit Type
City		Province		Postal Code
Phone		Primary Email		
Fax		Website		
Years as Mortgage Agent		Years in Mortgage Industry		
Broker License # <small>Note: Provide copy of license, if applicable</small>		Total Referral Volume in last 12 months <small>Note: All sources</small>		
Memberships	MPC	AMBA	CMBA	Other
Interest in Bridgewater Bank				
Business Geographical Area		Mortgage System Technology		

BUSINESS REFERENCES (E.G., BROKER OFFICE, LAWYER, ACCOUNTANT, ETC.)				
Name				
Address				
Phone		Email		
Name				
Address				
Phone		Email		
Name				
Address				
Phone		Email		

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BUSINESS INFORMATION					
How much volume do you fund annually?	\$				
What amount of your volume is conventional Alt-A?	\$	()	%
What percentage of your business falls into the following categories?	High Ratio A Business	%	Conventional A Business	%	
	Alt-A	%	B	%	
	Private	%	Commercial	%	Other
How much do you expect to fund in your first year with Bridgewater Bank?	\$				
What is your preferred method of contact?	Email	Phone	In Person	Text (SMS)	Other
How did you hear about Bridgewater Bank?	Referral (from)				
	Advertising (location)				
	Web (website)				
	Social Media (e.g., Blog, LinkedIn, Twitter)				
	BwB BDM				
	Other (e.g. Trade Show)				
Have you dealt with us in the past?	No	Yes (If "Yes", when was the last time you submitted and/or funded a deal?)			
Who are your preferred choices of "A" lender?	MCAP/RMG Streetwise Other	TD Canada Trust Equitable Bank	Merix CMLS	First National Home Trust	Scotiabank Street Capital
Who are your preferred choices of alternative lender?	Home Trust CWB/Optimum	MCAP/Eclipse Street Capital	Equitable Bank Other	B2B Bank	
Which private lenders do you use?	1.				
	2.				
	3.				
Do you use social media?	Twitter (e.g. @BwBBrokerNews)				
	LinkedIn (e.g. linkedin.com/company/bridgewater-bank)				
	Facebook (e.g. facebook.com/BwBBrokerNews)				

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Broker Service Level Agreement



Record keeping requirements:

I/We agree to keep the following information on file for all customers purchasing Bridgewater Bank mortgages and to produce this information at any time on the request of an authorized representative of Bridgewater Bank.

- Full legal name of the customer as it appears on identification
- Any short forms of the customer's name, nicknames, or other aliases commonly used by the customer (e.g., Robert-Bob, Richard-Dick, etc.)
- Date of birth
- Resident address
- Occupation (state nature of business if self-employed)
- Name and address of employer and type/nature of business
- Copy of all cheques used for down payment
- Original signer customer information and mortgage application

Credit bureau and social insurance number consent:

I/We agree to obtain written consent from each mortgage applicant to obtain credit bureau information/or credit information from creditors disclosed or subsequently identified/or as stated on the mortgage application. I/We also agree to inform the customer that they are not obliged to provide their SIN number on a credit application; however, the use of a SIN number may ensure a more accurate match between the customer's personal information and the customer's credit bureau information.

I/We agree to meet with each customer personally to ensure the identity of each applicant and the accuracy of their information. I/We hereby certify and declare the above information and attachments is/are true and accurate.

Authorized Signatory

Date

Please submit your signed forms to your BDM. Get their contact information by visiting BwBrokerinfo.ca/contact-us or scan and email your forms to underwriting.helpdesk@bridgewaterbank.ca.

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