

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 (NOTE: Please include legal name)

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 # (NOTE: Provide copy of license, if applicable)

MPC

AMBA

CMBA

Other

Memberships

Total Referral Volume in the last 12 months
(NOTE: All sources)

Business Geographical Area

Mortgage System Technology

Interest in Bridgewater Bank

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BUSINESS REFERENCES (E.G., BROKER OFFICE, LAWYER, ACCOUNTANT, ETC.)

Name

Address

Phone

Email

Name

Address

Phone

Email

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?

High Ratio A Business

Conventional A Business

Other

What amount of your volume is conventional Alt-A?

Alt-A

B

Private

Commercial

What percentage of your business falls into the following categories?

Email Phone In Person Text (SMS) Other

How much do you expect to fund in your first year with Bridgewater Bank?

What is your preferred method of contact?

Referral (from)

Advertising (location)

Web (website)

Social Media (app)

BwB BDM (name)

Other (e.g., tradeshow)

How did you hear about Bridgewater Bank?

No

Yes (If "Yes", when was the last time you submitted and/or funded a deal?)

Have you dealt with us in the past?

MCAP/RMG

TD Canada Trust

Merix

First National

Scotiabank

Streetwise

Equitable Bank

CMLS

Home Trust

Street Capital

Other

Who are your preferred choices of "A" lender?

Home Trust

MCAP/Eclipse

Equitable Bank

B2B Bank

CWB/Optimum

Street Capital

Other

Who are your preferred choices of alternative lender?

1.

2.

3.

Which private lenders do you use?

Twitter (e.g. @BwBBrokerNews)

LinkedIn (e.g. linkedin.com/company/bridgewater-bank)

Facebook (e.g. facebook.com/BwBBrokerNews)

Do you use social media?

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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 product 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 consent from each mortgage applicant to obtain credit bureau information/or credit information from creditors disclosed or subsequently identifies/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 Signature

Date

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

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