

# BROKER HOUSE APPLICATION



Great partnerships don't just come along every day. After 25 years, we're still just as eager to roll up our sleeves to serve our brokers and their clients. We're lucky that partners like you make it easy. Much like you and this application, we're just getting started. Become a Bridgewater Bank partner in 15 minutes (or less) with our simple Broker Application.

**No one likes paperwork, but we've made it easy. There are three sections to fill out, then sign, and you're done!**  
**Once complete, send it to your BDM.**

## SECTION ONE: OFFICE INFORMATION

Business Name		Network Name		
Street Number	Street Name	Street Type		
Street Direction	Unit #	Unit Type		
City	Province	Postal Code		
Phone	Primary Email			
Fax	Website	Date Business Est.		
Broker of Record/Submitting Broker		Broker of Record/Submitting Broker Title		
Submitting Agent		Business Geographic Area		
		<input type="checkbox"/> BC <input type="checkbox"/> AB <input type="checkbox"/> SK <input type="checkbox"/> MB <input type="checkbox"/> ON		
Mortgage System ID e.g. Expert, Newton or other		Mortgage System ID Number		
Memberships				
<input type="checkbox"/> MPC <input type="checkbox"/> AMBA <input type="checkbox"/> CMBA <input type="checkbox"/> Other				
Interest in Bridgewater Bank				
<input type="checkbox"/> Conventional Rentals		<input type="checkbox"/> Construction		<input type="checkbox"/> Support/Training for packaging deals
<input type="checkbox"/> Income Type (Self-Declared and BFS)		<input type="checkbox"/> General Alternative Lending		<input type="checkbox"/> Refis-ETO

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SECTION TWO: BUSINESS REFERENCES

Reference check is part of our due diligence.  
Please provide two professional references. (for example, accountant, lawyer, broker office, etc.)

Reference One

Name

Address

Phone Email

Reference Two

Name

Address

Phone Email

List all Agents/Brokers/Underwriters assigned to the broker office who will be submitting mortgage applications. Attach additional pages if necessary.

Name	Phone	Email	Welcome Package	
			<input type="checkbox"/> Yes	<input type="checkbox"/> No
			<input type="checkbox"/> Yes	<input type="checkbox"/> No
			<input type="checkbox"/> Yes	<input type="checkbox"/> No
			<input type="checkbox"/> Yes	<input type="checkbox"/> No
			<input type="checkbox"/> Yes	<input type="checkbox"/> No

# BROKER HOUSE APPLICATION continued.



## SECTION THREE: 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 consent from each mortgage applicant to obtain credit bureau information/or credit information from creditors disclosed or subsequently identified 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.

### Broker Declaration:

I/We agree to meet with each applicant personally and take reasonable measures to ensure the identity of each applicant. I/We agree to take reasonable measures to verify that the information and documentation provided by the applicant is complete, accurate and true.

When selecting a mortgage product for the applicant, I/We will consider and assess applicant's circumstances, including their financial needs, as well as, product features, charges, risks and benefits, to provide the applicant with the best suitable product, as applicable. If a Bridgewater Bank product is not suitable for the applicant, the applicant will be advised in writing.

Authorized Signature

Date

**Please submit the completed form to your BDM.** Get their contact information by visiting [BwBbrokerinfo.ca/contact-us](http://BwBbrokerinfo.ca/contact-us), then save and email this form to them.

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