MORTGAGE AGENT 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 Mortgage Agent 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

Fax

Broker of Record/Principal Contact

Position/Title

SECTION ONE: AGENT INFORMATION

Last 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

Broker of Record/Principal Contact

Position/Title

Years as Mortgage Agent

Years in Mortgage Industry

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

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SECTION ONE: AGENT INFORMATION continued.

Mortgage System ID e.g. Expert, Newton or other

Mortgage System ID Number

Memberships

☐ MPC ☐ AMBA ☐ CMBA ☐ Other

Interest in Bridgewater Bank

☐ Conventional Rentals ☐ Construction ☐ Support/Training for packaging deals

☐ Income Type (Self-Declared and BFS) ☐ General Alternative Lending ☐ Refis-ETO

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

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SECTION THREE: MORTGAGE AGENT 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.

Mortgage Agent 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, then save and email this form to them.

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