# BUYER’S INFORMATION WORKSHEET

1. **OWNERSHIP**

# Legal Name(s) of intended Registered Owner(s)

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

First Middle Last

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

First Middle Last

# Date(s) of Birth

1. \_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_

**Marital Status**

□ Married

□ Single

□ Divorced

□ Separated

# Name of Spouse (if not an intended registered owner)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

First Middle Last

# Home Phone Number Cell Phone Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Work Phone Number Email Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Present Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Street Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City Province

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Postal Code

# TITLE INSTRUCTIONS

Owners can take title to the property either as “joint tenants” or as “tenants in common.” Most couples buy their homes as "joint tenants". This means that if either one of you should die while owning the property, the interest that the deceased person holds in the property would automatically vest and be transferred to the surviving owner. This means that the deceased owner's interest would not be governed by that person's Will, would not form part of that person's over-all estate and would not be subject to estate ("probate") fees. It is a form of estate planning and makes sense for couples in most instances.

In some cases, people may wish to keep their interests legally separate and divisible. In that case, you might own the property as "tenants in common", meaning that you own a particular percentage interest in the property. If you hold property in that manner, you would be able to convey your interest in the property to someone else in your Will, but the value of your interest would be subject to estate administration fees. You tend to see more of this type of ownership with individuals entering into a business arrangement or investment.

How would you like to take title:

□ joint tenants □ tenants in common □ individual

(Please specify, if percentages): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **PROPERTY INFORMATION**

What is the present use of the property? □ residential □ commercial

Is this an investment (rent-generating) property? □ yes □ no

Is the property situated near a lake, river, creek, or wetland? □ yes □ no

Is there a swimming pool on the property? □ yes □ no

How is the property heated? □ gas □ oil □ propane □ electric

How is the water supplied? □ municipality □ private well □ share well

Sewage system □ municipality □ septic system

# LENDER INFORMATION

Will you be borrowing finds to complete the transaction?

□ Yes

□ No

If Yes, from whom:

□ Family Member / Friend

□ Private Lender

□ Financial Institution

# Lender/Broker Name Contact’s Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Address / Branch Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Phone Fax

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Email

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **INSURANCE**

# Insurer or Insurance Broker Contact’s Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Address / Branch Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Phone Fax

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Email

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# LAND TRANSFER TAX INFORMATION

Confirm that the person(s) taking title to the property is/are at least 18 years of age:

□ Yes

□ No

Confirm that the person(s) taking title to the property will be occupying the property as his/her/their primary residence no later than 9 months after the closing date?

□ Yes

□ No

Indicate whether any person(s) taking title to the property ( or spouse of person taking title to the property) previously owned a home or an ownership interest in a home anywhere at any time?

□ Yes

□ No