

Real Estate Refinance Form

Personal Details

Name in Full (First, Middle, Last)			
Date of Birth			
Marital status			
Citizenship			
Present Address			
Telephone Home and Cell			
Email		OK to contact by email?	

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Telephone Home and Cell			
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New Mortgage

New Mortgage Company Name (or secured line-of-credit institution)	
New Mortgage Company Branch Address	
Contact and Reference Number of New Mortgage Company or Institution	

Existing Mortgage

Mortgage Company Name (or secured line-of-credit institution)	
Mortgage Company Branch Address	

Contact and Reference Number of New Mortgage Company or Institution	
Fire Insurance Agent	
Is this property owner-occupied or rental?	
If rental, details including name of tenant, lease terms, deposit, notice given, etc.	
Forwarding address of tenants (if applicable)	

What is the heat source?

Oil		Propane		Gas		Electricity		Other (specify)	
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Water and Waste

Municipal and Sewer?		Well and Septic?		Water Potability Report?		Use Permit?	
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Building Location Survey and Use

Is there a current & accurate building location survey?	
Do you intend to change the use of the property from its current use?	
If yes, details	