

# Mortgage Application Documentation

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# Mortgage Application

## Description

The Mortgage Application tool presents the user with a pop-up window when they click the “Apply Now” button. The pop-up window contains a mortgage application form, separated into multiple pages, which the user can fill out and submit securely.

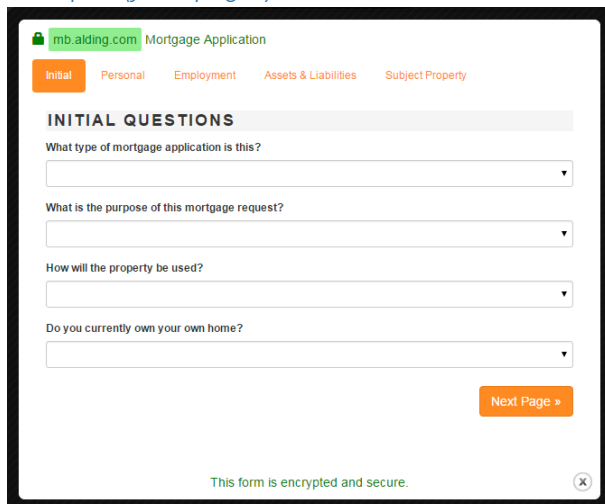
When a user submits an application, you will receive an email informing you of the submission, with a password-protected link you can use to view and/or print the submitted application (see page 4 for examples). Use your website admin password to view the application.

## Front-End Application Workflow

Example (initial button)



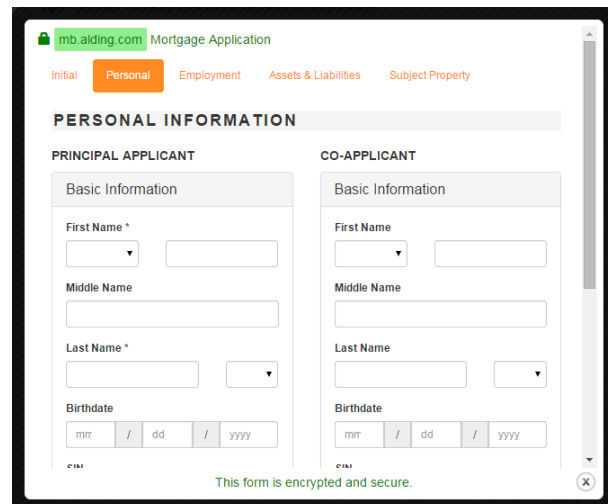
Examples (form pages)



The screenshot shows the 'INITIAL QUESTIONS' page of the mortgage application form. The browser address bar shows 'mb.aiding.com Mortgage Application'. The navigation tabs are 'Initial', 'Personal', 'Employment', 'Assets & Liabilities', and 'Subject Property'. The 'Initial' tab is selected. The form contains four questions, each with a dropdown menu:

- What type of mortgage application is this?
- What is the purpose of this mortgage request?
- How will the property be used?
- Do you currently own your own home?

A 'Next Page »' button is located at the bottom right. A security notice at the bottom states 'This form is encrypted and secure.' with a close button (X).



The screenshot shows the 'PERSONAL INFORMATION' page of the mortgage application form. The browser address bar shows 'mb.aiding.com Mortgage Application'. The navigation tabs are 'Initial', 'Personal', 'Employment', 'Assets & Liabilities', and 'Subject Property'. The 'Personal' tab is selected. The form is divided into two columns: 'PRINCIPAL APPLICANT' and 'CO-APPLICANT'. Each column has a 'Basic Information' section with the following fields:

- First Name \* (with a dropdown menu)
- Middle Name
- Last Name \* (with a dropdown menu)
- Birthdate (with a date picker: mm / dd / yyyy)

A security notice at the bottom states 'This form is encrypted and secure.' with a close button (X).

mb.aiding.com Mortgage Application

Initial Personal **Employment** Assets & Liabilities Subject Property

### EMPLOYMENT INFORMATION

**PRINCIPAL APPLICANT**

Current Employer

Employer

Address

City / Province

Phone

**CO-APPLICANT**

Current Employer

Employer

Address

City / Province

Phone Number

This form is encrypted and secure.

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Initial Personal Employment **Assets & Liabilities** Subject Property

### ASSETS & LIABILITIES INFORMATION

**PRINCIPAL APPLICANT**

Assets

	Balance
Savings Account Balance	\$
Chequing Account Balance	\$
RRSP Balances	\$
Stocks / Bonds	\$
Vehicle(s) Value	\$
Residence	\$
Other Real Estate	\$
Other	\$
Name of Bank	

Liabilities

Company	Balance	Monthly Payment
Loans	€	€

This form is encrypted and secure.

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Initial Personal Employment Assets & Liabilities **Subject Property**

### SUBJECT PROPERTY INFORMATION

Street \*

City / Province \*

Postal Code \*

Description

Sale Price

Notes

This form is encrypted and secure.

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Mortgage Amount

\$

**Terms**

I/We warrant and confirm that the information given in this mortgage application is true and correct and I/we understand that it is being used to determine my/our credit responsibility and will be forwarded to a financial intermediary and/or mortgage lender. I/We authorize, you and any financial intermediary and/or mortgage lender to whom this application was forwarded (individually or collectively defined as the "Recipients"), to obtain any information the Recipients may require relative to this application from any sources to which the Recipients apply and each source is hereby authorized to provide the Recipients with such information. The Recipients are furthermore authorized to disclose, in response to direct inquiries from any other lender or credit bureau, such information on my loan request as the Recipients consider appropriate, and I agree to indemnify the Recipients against any and all claims in damages or otherwise arising from such disclosure on the Recipients part. The Recipients are also authorized to retain the application whether or not the relative mortgage is approved.

**Online Applications**

Please read the paragraph above prior to sending completed application. By transmitting the online mortgage application you are accepting the terms of the paragraph noted above.

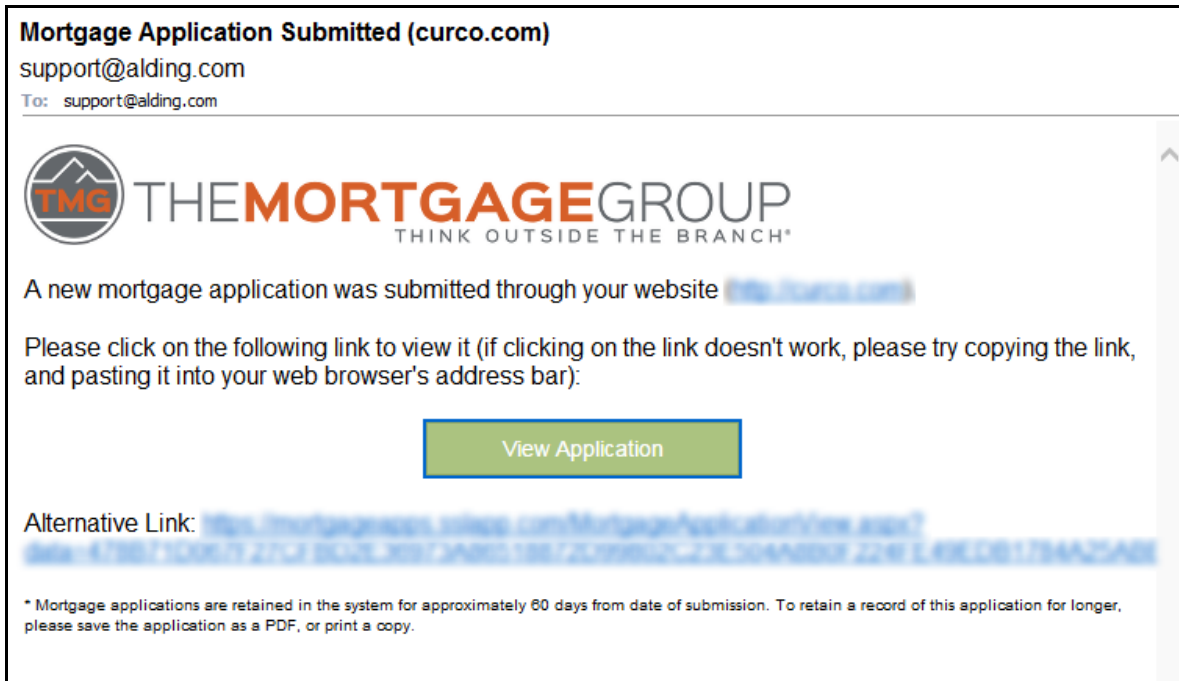
« Prev Page Submit Application »

This form is encrypted and secure.

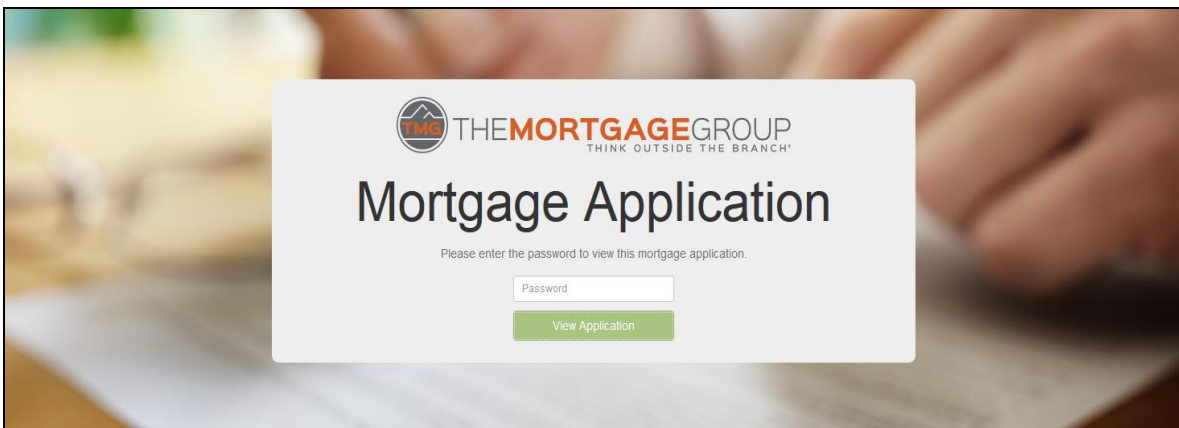
Example (thank you message)

**Thank you! Someone will be in touch with you shortly.**

Example (email sent to broker)



Example (password form to access application)



- Password is your website admin password
- You can then view the application, print it, save it as a PDF, and/or submit it to D+H Expert, if that feature is enabled for your profile (see following image)

Example (viewed mortgage application, with action buttons)

<a href="#">Print</a> <a href="#">Save as PDF</a> <a href="#">Close</a>	<a href="#">Upload to D+H Expert</a>
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## MORTGAGE APPLICATION

BROKER.SITE.ALDING.COM  
OCTOBER 4, 2016



INITIAL QUESTIONS	
What type of mortgage application is this?	Approval
What is the purpose of this mortgage request?	Refinance an existing mortgage(s)
How will the property be used?	This is my/our vacation home
Do you currently own your own home?	No, we live with others

PERSONAL INFORMATION			
PRINCIPAL APPLICANT		CO-APPLICANT	
First Name	Judge PrFirst	First Name	Judge CoFirst
Middle Name	PrMiddle	Middle Name	CoMiddle
Last Name	PrLast IV	Last Name	CoLast IV
Birthdate	11-11-2016	Birthdate	12-12-2016
SIN	888888888	SIN	999999999
Marital Status	Common Law	Marital Status	Common Law
Dependants	10+	Dependants	10+
CURRENT ADDRESS		CURRENT ADDRESS	
Street	PR Current Address Street	Street	CO Current Address Street