

Estate Loan

Application Form



If additional space is required to complete any section of this application, please indicate on the application form and attach additional pages to this application.

BORROWER DETAILS

Name	<input type="text"/>	Date of birth	<input type="text"/>
Address	<input type="text"/>	Phone	<input type="text"/>
Postal code	<input type="text"/>	Driver's licence #	<input type="text"/>
City	<input type="text"/>	Email	<input type="text"/>

LOAN REQUEST SUMMARY

Principal requested	<input type="text"/>	Setup fee (Office use only)	<input type="text"/>
Funding date	<input type="text"/>		
Has the borrower had funds advanced against their interest in the estate?	Yes <input type="radio"/>	No <input type="radio"/>	
If yes, what is the total of the funds advanced?	<input type="text"/>		

ESTATE DETAILS

Name of deceased	<input type="text"/>	Date of death	<input type="text"/>
Name of executor	<input type="text"/>		
Date probate was granted	<input type="text"/>		
Relationship of the borrower to the deceased	<input type="text"/>		
Was the deceased married when they passed?	Yes <input type="radio"/>	No <input type="radio"/>	If yes, for how long? <input type="text"/>
Did the deceased have any previous marriages?	Yes <input type="radio"/>	No <input type="radio"/>	
If yes, to whom?	<input type="text"/>	If yes, for how long?	<input type="text"/>
Did the deceased have any children?	Yes <input type="radio"/>	No <input type="radio"/>	
Please provide their names and ages	<input type="text"/>		

CLAIM DETAILS (IF APPLICABLE)

To the borrower's knowledge, are any claims being made against the estate?

Yes No

If so, what sort of claim is being advanced?

If the borrower is the individual bringing the claim, please provide details.

DOCUMENTS TO BE PROVIDED

Please provide the following for underwriting purposes:

- A copy of the Death Certificate (if available)
- A copy of the Will
- A copy of the Grant of Probate
- A copy of the Affidavit of Assets and Liabilities of the Estate (P10)

Lawyer Name

Application Date

Signature