

Gennaro (Gerry) Gatto  
Hons B.A., LL. B



**GERRY G. GATTO**  
PROFESSIONAL CORPORATION  
*Barristers & Solicitors*

Ancaster: 905-304-5535  
Toronto: 1-888-428-8601  
Facsimile: 905-304-4363  
Email: [ggatto@gattolaw.ca](mailto:ggatto@gattolaw.ca)  
[www.gattolaw.ca](http://www.gattolaw.ca)

**Reply To:**

- Head Office:** 71 Wilson St. East Ancaster, ON L9G 2B3  
 **Satellite Office:** 108-5397 Eglinton Avenue West. Toronto, ON M9C 5K6

**MORTGAGE / REFINANCE RETAINER FORM**

Were you referred to our office? If yes, by whom?

Address of property being mortgaged:

Closing Date:

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**Client #1:**

Last Name:

First Name:

Middle Name:

Date of Birth:

Telephone Number:

Current Address:

Do you currently reside in the mortgaged property?

Email:

Occupation:

Employer Name/Address & Phone Number:

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**Client #2:**

Last Name:

First Name:

Middle Name:

Date of Birth:

Telephone Number:

Current Address:

Do you currently reside in the mortgaged property?

Email:

Occupation:

Employer Name/Address & Phone Number:

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**TITLE / OWNERSHIP:**

Is a change or transfer in title required as a part of the mortgage transaction? YES / NO

If "yes", please advise.

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**SPOUSAL STATUS:**

Are you legally married? YES / NO

If "yes"-Full name of spouse:

Are you legally married but separated? YES / NO

If "no", have you retained a family lawyer? We can assist with a separation agreement if needed.

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**MORTGAGE(S) / LINE OF CREDIT TO BE PAID OUT ON CLOSING** (PLEASE CIRCLE/SPECIFY EITHER  
MORTGAGE OR LINE OF CREDIT)

1<sup>st</sup> Mortgage / Line of Credit:                      Bank:                      Loan #:

2<sup>nd</sup> Mortgage / Line of Credit:                      Bank:                      Loan #:

Other Debt- Please list and include loan number):

**\*\*Please provide our office a credit card statement to be paid\*\***

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**INSURANCE:**

Name and phone number of your Home Insurance Broker (*please contact them to consent to the release of information to our office*):

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**MUNICIPAL TAXES:**

Are your municipal taxes paid by you or your bank?

If paid by you, are the taxes up to date and when was your last payment?

**\*\*Please provide your last tax bill / invoice issued by the City/ Township\*\***

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I/We agree to retain the services of Gerry G. Gatto Professional Corporation for the completion of this transaction. YES / NO