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**RETAINER AGREEMENT AND
CLIENT INTAKE FORM**

Thank you for providing our office with your recent Agreement of Purchase and Sale for your upcoming real estate transaction.

By signing this Retainer Agreement and Client Intake Form you understand that you have retained our office to act on your behalf with respect to this transaction, and upon receipt of this signed Retainer Agreement and Client Intake Form we will begin any duties required to complete this transaction.

Please be advised that this Retainer Agreement and Client Intake Form is only for the subject transaction, and any further transactions will require a separate Retainer Agreement and Client Intake Form.

NEW IDENTIFICATION REQUIREMENTS OF THE LAW SOCIETY OF ONTARIO

When signing electronically, and not attending our office in-person, the Law Society of Ontario has updated the Rules and Regulations pertaining to identifying clients via virtual meetings. The new Rules and Regulations state that we must complete the following:

- Have clients provide our office with a scanned copy of two pieces of identification (front and back), which must include one piece of government-issued photo identification, and none of which can be a Health Card; **and**
- Use a technology platform to ensure the pieces of identification provided are authentic, valid, and current.

We will provide you with the information of a third-party authentication platform (**Treefort**) for you to complete. If you have any questions or concerns regarding the process, please contact our office.

INTAKE FORM:

BY WHOM WERE YOU REFERRED: _____

ADDRESS OF PROPERTY: _____

CLOSING DATE: _____

CLIENT NO. 1 INFORMATION

FULL LEGAL NAME: _____

DATE OF BIRTH: _____

PHONE NUMBER: _____ EMAIL: _____

WILL YOU BE RESIDING AT THE PROPERTY? _____

OCCUPATION: *(Please specify what you do if self-employed)* _____

PLACE OF EMPLOYMENT: _____

ADDRESS OF EMPLOYER: _____

SPOUSAL STATUS: _____ NAME OF SPOUSE: _____
(Legally married, common-law, separated, divorced, single, etc.)

CLIENT NO. 2 INFORMATION

FULL LEGAL NAME: _____

DATE OF BIRTH: _____

PHONE NUMBER: _____ EMAIL: _____

WILL YOU BE RESIDING AT THE PROPERTY? _____

OCCUPATION: *(Please specify what you do if self-employed)* _____

PLACE OF EMPLOYMENT: _____

ADDRESS OF EMPLOYER: _____

SPOUSAL STATUS: _____ NAME OF SPOUSE: _____
(Legally married, common-law, separated, divorced, single, etc.)

INFORMATION FOR YOUR PURCHASE TRANSACTION:

TITLE/OWNERSHIP TO BE HELD AS SOLE OWNER OR JOINT TENANTS OR AS TENANTS IN COMMON: *(Joint tenants indicates a right of survivorship and tenants in common would have your share go to your estate. If tenants in common, please specify the percentage owned of each person)*

Sole Owner: _____ Joint Tenants: _____ Tenants in Common: _____ %

ARE YOU A FIRST TIME HOME BUYER: _____

- To qualify, you:*
- cannot have owned a property anywhere in the world, or have lived with your spouse (legally or common-law) while they owned a home.
 - must reside at the property you are purchasing as your principal residence.
 - If your spouse previously owned a home prior to your marriage (legally or common-law), and sold it, please provide the property address of the home sold and the date it was sold.

ARE YOU A CANADIAN CITIZEN OR PERMANENT RESIDENT OF CANADA: _____
Pursuant to section 116 of the Income Tax Act (Canada)

ARE YOU SELLING A CURRENT PROPERTY TO PURCHASE THIS ONE: _____
(If so, please provide Agreement of Purchase and Sale if we are acting on your behalf – a separate Retainer Form will be sent to you for this)

ARE YOU OBTAINING A MORTGAGE OR LINE OF CREDIT: _____

ARE YOU WORKING WITH A MORTGAGE BROKER: _____

NAME OF LENDER FOR MORTGAGE OR LINE OF CREDIT: _____

NAME OF MORTGAGE BROKER: _____

DO YOU HAVE A SIGNED MORTGAGE OR LINE OF CREDIT AGREEMENT: _____

(If yes, please provide a copy of this)

PROPERTY INSURANCE BROKER/COMPANY: _____

ARE YOU ASSUMING ANY RENTAL CONTRACTS: _____

(Furnace, hot water tank, etc.)

IS THERE A WELL, SPETIC TANK, CISTERN, OIL OR PROPANE TANK: _____

HAVE YOU CONTACTED UTILITY COMPANIES: _____

(Gas, water, hydro)

WILL ANY PORTION OF THE PROPERTY TENANTED: _____

DO YOU CONFIRM THAT OUR FIRM WILL BE ACTING ON YOUR BEHALF: _____

DATED at _____, this _____ day of _____, 20____.

Signature
Name:

Signature
Name: