

In an effort to make your customer experience more positive, we have created this condensed form for you to provide your information to us without completing our full application. We will gather majority of the necessary information from the financial documentation you provide us. Thank you again for continuing your journey to become a Manulife Bank customer.

What is the name of your Financial Advisor: \_\_\_\_\_  
Do you authorize Manulife Bank to inform your Financial Advisor of this process: YES or NO

**PERSONAL INFORMATION:**

**For you (applicant):**

Full name: \_\_\_\_\_  
Home address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Home phone: \_\_\_\_\_  
Cell phone: \_\_\_\_\_  
Work phone: \_\_\_\_\_  
Birthdate: DD/MMM/YYYY  
Social Insurance Number (SIN): \_\_\_\_\_

Are you a Canadian Resident/Canadian Permanent Resident?  
 YES or  NO (select one)  
If no, please provide a copy of your permanent residency application.  
To have your application considered by Manulife, we require permission to run a credit bureau check. Please indicate  
 YES or  NO  
Date: DD/MMM/YYYY time: \_\_\_\_\_

Would you like to save \$200 this year? Sign up and try one of our ManulifeMoney+Visa Cards: YES or NO

**If applicable, co-applicant:**

Full name: \_\_\_\_\_  
Home address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Home phone: \_\_\_\_\_  
Cell phone: \_\_\_\_\_  
Work phone: \_\_\_\_\_  
Birthdate: DD/MMM/YYYY  
Social Insurance Number (SIN): \_\_\_\_\_

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 YES or  NO  
Date: DD/MMM/YYYY time: \_\_\_\_\_

**EMPLOYMENT INFORMATION:**

**For you (applicant):**

Please indicate your employment type:  
 Self Employed  3rd Party Employed  Other: \_\_\_\_\_

**If 3rd Party Employed, you will be required to provide a signed and dated letter of employment. In the meantime please provide the following information:**

Employer: \_\_\_\_\_  
Title: \_\_\_\_\_  
Gross salary: \_\_\_\_\_  
Original start date: \_\_\_\_\_  Full time or  Part time  
If you have been employed under 5 years with your current organization, please provide.  
Previous Employer: \_\_\_\_\_ Years of service: \_\_\_\_\_

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 Self Employed  3rd Party Employed  Other: \_\_\_\_\_

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Previous Employer: \_\_\_\_\_ Years of service: \_\_\_\_\_

**PROPERTY INFORMATION:**

Please provide us some detailed information on your current home. This can be submitted through the previous MLS listing of your home, purchasing agreement, MPAC statement (Municipal Property Assessment Corporation) or your latest property tax bill.

Style of your home (Select one):  Bungalow,  Multi-storey,  Townhouse,  Split Level,  Condo,  Other

Is your home  detached or  semi-detached? (If applicable)

If condo, monthly maintenance fees: \$ \_\_\_\_\_

Date of purchase: \_\_\_\_\_ Besides yourself, who is on the title of the home? \_\_\_\_\_

Purchase price: \_\_\_\_\_ Square footage of home (excluding basement): \_\_\_\_\_ Age of home: \_\_\_\_\_

Lot size (if applicable): \_\_\_\_\_

If yes, greater than 5 acres?  YES or  NO

Garage:  YES or  NO

If yes,  single,  1.5,  double or  triple? (Select one)

If yes, is garage attached?  YES or  NO

Water Source (Select one):  Municipal water,  private well

Heating (Select one):  Forced air,  electric baseboard,  other

Value of any upgrades since purchase of property? \$ \_\_\_\_\_

Approximate value of the property? \$ \_\_\_\_\_

Annual property tax: \$ \_\_\_\_\_

Net increase requested: \_\_\_\_\_

**REQUIRED REGULATORY INFORMATION:**

**For you (applicant):**

Marital Status (select one):  Single,  Married,  Common Law,  Separated,  Divorced,  Widowed,  Other

If separated, provide a copy of the separation agreement

How many dependents are living with you (under the age of 18)? \_\_\_\_\_

Have you (or partner/spouse) been bankrupt, made a voluntary assignment into bankruptcy, made a consumer proposal relating to bankruptcy or insolvency in the last 6 years?

YES or  NO

Do you currently have any lawsuits or judgements against you?

YES or  NO

Are you a US Citizen or US Resident for tax purposes?

YES or  NO

If yes, SSN or ITTIN: \_\_\_\_\_

Are you required to pay any alimony and/or child support (select one)?  YES or  NO

If yes, what is the monthly amount? \$ \_\_\_\_\_

Have you or any close relative ever held a senior position in government, political party, military, tribunal or government owned corporation of Canada or a foreign country (select one)?

YES or  NO

If yes, please elaborate: \_\_\_\_\_

Intended use of this account? \_\_\_\_\_

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Have you or any close relative ever held a senior position in government, political party, military, tribunal or government owned corporation of Canada or a foreign country (select one)?

YES or  NO

If yes, please elaborate: \_\_\_\_\_

Intended use of this account? \_\_\_\_\_

**DEBT/LINE OF CREDIT:**

Please list all active lines of credit, family loans you and the co-applicant currently have.

Loan #1: \_\_\_\_\_ Owning Balance: \$ \_\_\_\_\_

Loan #2: \_\_\_\_\_ Owning Balance: \$ \_\_\_\_\_

Loan #3: \_\_\_\_\_ Owning Balance: \$ \_\_\_\_\_

Loan #4: \_\_\_\_\_ Owning Balance: \$ \_\_\_\_\_

**OTHER ASSETS:**

Please provide a list of all active bank accounts & investments across your financial institutions. Examples include Chequing & Savings, RRSPs, Stocks & Bonds, GICs, LIRAs, Non-Reg, TFSAs).

**BANK ACCOUNTS AND INVESTMENTS:**

Account type: \_\_\_\_\_ Balance: \_\_\_\_\_

Account type: \_\_\_\_\_ Balance: \_\_\_\_\_

Account type: \_\_\_\_\_ Balance: \_\_\_\_\_

Account type: \_\_\_\_\_ Balance: \_\_\_\_\_

Account type: \_\_\_\_\_ Balance: \_\_\_\_\_

**LIFE INSURANCE:**

If applicable, please provide information on the amount and type of insurance you have.

Account type: \_\_\_\_\_ Balance: \_\_\_\_\_

Account type: \_\_\_\_\_ Balance: \_\_\_\_\_

**AUTO AND RECREATIONAL VEHICLES:**

If applicable, please provide Year, Make & Model and estimated value of all auto and recreation vehicles (eg. RV, ATVs, boat) in your ownership.

Vehicle type: \_\_\_\_\_ Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_ Estimated value: \_\_\_\_\_

Vehicle type: \_\_\_\_\_ Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_ Estimated value: \_\_\_\_\_

**ADDITIONAL PROPERTIES:**

Property type: \_\_\_\_\_ Address: \_\_\_\_\_

Estimated value: \_\_\_\_\_ Mortgage Balance: \_\_\_\_\_

Property type: \_\_\_\_\_ Address: \_\_\_\_\_

Estimated value: \_\_\_\_\_ Mortgage Balance: \_\_\_\_\_

**CREDIT CARD APPLICATION**

Start earning valuable cash back rewards on your purchases today with one of our ManulifeMONEY+ Visa Credit Cards. You can compare the cards' features on our [website](#). By selecting YES on your preferred card below, you agree you have read and acknowledged our Disclosure Statement and understand a credit check will be run.

**Applicant:**

ManulifeMONEY+ Visa Infinite Card  
ManulifeMONEY+ Visa Platinum Card  YES  NO  
 YES  NO

**Co-Applicant:**

ManulifeMONEY+ Visa Infinite Card  YES  NO  
ManulifeMONEY+ Visa Platinum Card  YES  NO

**Holly Baranieski**

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