

Hi Client

Your mortgage broker has invited you to collaborate on your mortgage application.

test

To start, you need to create an account.

Get started

## Accept the invitation

- **From email:** Open the email invitation from your mortgage broker
- Click **"Get Started"** to begin your application. You will be redirected to a secured portal
- If you are new to the platform, **create and account** using your name and email
- If you already have an account, simply **log in**

Reply

Unread Delete Archive Move More

Purchase | Created on 23 May 2025

Hi Client, let's complete your mortgage application.

Go to application



## Start Your Application

- Click **"Go to application"**

Goal

- ☐ Borrowers
- ☐ Income
- ☐ Assets
- ☐ Properties
- ☐ Professionals
- ☐ Consent
- ☐ Review and submit

What's your mortgage goal?  
Step 1 of 7

I want to

- ☒ Purchase
- ☐ Renew
- ☐ Refinance

Where are you in the process of purchasing?

- ☐ I've found the property I want
- ☐ Have not started
- ☐ Actively searching for a home

## Step 1 - GOAL : Select Your Options

- Answer the questions according to your financing goals

Goal

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What purchase price are you considering for the new property?

e.g. \$200,000

What's the total amount you're considering for down payment?

Amount

Percentage

e.g. \$20,000

0%

Intended use for this property

☐ Owner Occupied

☐ Owner Occupied / Rental

☐ Rental / Investment

☐ Second Home / Vacation Property

Save & continue

Goal

Borrowers

Income

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Review and submit

Borrowers on the mortgage

Step 2 of 7

Client

123@gmail.com

(604) 987 6543

Account status: Active

DOB: Incomplete

Living history: Borrower needs 3 years of living history

Edit details

+ Add a borrower

Finish adding borrowers

Goal

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Borrowers on the mortgage

Step 2 of 7

Add another borrower to your deal?

Additional borrowers can be added to your mortgage application. You can fill in their details or invite them to create an account.

First name \*

Enter first name

Last name \*

Enter last name

Email address \*

Enter email

Phone number

e.g. 555-555-5555

Work phone number

Extension can be appended to the phone number eg. 555-555-5555 ext. 123

e.g. 555-555-5555 ext. 123

Do you want to invite the borrower?

You can invite them to create an account. This will allow them to view and edit the application, respond to document requests and receive messages from your broker.

Click "Save & continue"

Step 2 - BORROWERS : Add Borrower Info

Click "Edit Details", and enter you personal details (name, date of birth, contact info, etc)

Add co-applicant (if applicable), by clicking "Finish adding borrowers"

Click "Finish adding borrowers", when all borrowing applicants have been added

\* Lenders require 3 years of living history to verify identity \*

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Do you want to invite the borrower?

You can invite them to create an account, this will allow them to view and edit the application, respond to document requests and receive messages from your broker.

You can choose to hide certain income sources, assets, and properties from other borrowers in this application.

Send an invite?

Yes

No

Personal details

Is this borrower a first time buyer?

Yes

No

Marital status

Select marital status

What is the Social Insurance Number (SIN) for this borrower?

Adding your SIN is completely voluntary.

e.g. 123 123 123

Goal

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Review and submit

Living history

Current address

Street number \*

Street name \*

Street type \*

Street direction

Unit

City \*

Province \*

Country

Postal code \*

Clear address details

Living situation at this address

Renting

Owner

Live with Parents

Other

Move in date

If you don't know the exact day, please estimate.

December

01

2025

Lenders need 3 years of living history to verify identity

Assets

Properties

Professionals

Consent

Review and submit

Living history

Previous address

Country

Autocomplete address \*

Or enter address manually

Living situation at this address

Renting

Owner

Live with Parents

Other

Move in date

If you don't know the exact day, please estimate.

Month

Day

Year

Move out date

Month

Day

Year

Save Borrower

Cancel

Please address the following errors and try again

Please provide a valid SIN

Click "Save Borrower" once you are finished with adding your personal details

Goal

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## Income history of borrowers

Step 3 of 7

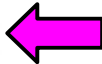
You can choose to hide certain income sources, assets, and properties from other borrowers in this application.

Client

Client needs 3 years of income history

+ Add a source of income

Finish adding income



## Step 3 - INCOME : Enter Employment and Income

Click "Finish adding income"

Provide details of your employer name and job title, length of employment, gross monthly income, etc.

Goal  
Borrowers  
Income  
Assets  
Properties  
Professionals  
Consent  
Review and submit

### Income history of borrowers

Step 3 of 7

You can choose to hide certain income sources, assets, and properties from other borrowers in this application.

Income type  
Employed

Business name  
ABC

Business country  
Canada

Autocomplete address  
Enter business name/address  
Or enter the business details manually

Job title  
Manager

Employment type  
Full Time

Part Time

Seasonal Full Time or Part Time

Payment type  
Hourly (Non-Guaranteed Hours)

Hourly (Guaranteed Hours)

Selected

Commission Only

Income from this source  
Monthly

Part Time

Seasonal Full Time or Part Time

Payment type  
Hourly (Non-Guaranteed Hours)

Hourly (Guaranteed Hours)

Selected

Commission Only

Income from this source  
Monthly

Hourly

Do you receive bonus, overtime or commissions?

No

Start date  
January 01 2020

Is this a current source of income?

Yes

No

Hide this income source from other borrowers in the application?

Yes

No

Save Income Cancel



Click "Save income"

<div> <div> <div>Goal</div> <div>Borrowers</div> <div><b>Income</b></div> <div>Assets</div> <div>Properties</div> <div>Professionals</div> <div>Consent</div> <div>Review and submit</div> </div> <div> <div>Income history of borrowers</div> <div>Step 3 of 7</div> <div> <div>You can choose to hide certain income sources, assets, and properties from other borrowers in this application.</div> <div>Client</div> <div> <div>\$70,000</div> <div>Hidden</div> </div> <div>Employed   2020-01-01 - Current</div> <div>Edit details</div> <div>Add another source of income</div> <div>Finish adding income</div> </div> </div> </div>	<div> <div>Click <b>"Add another source of income"</b> if you have additional sources of income. Otherwise, complete this step by clicking <b>"Finish adding income"</b></div> </div>
<div> <div> <div>Goal</div> <div>Borrowers</div> <div>Income</div> <div><b>Assets</b></div> <div>Properties</div> <div>Professionals</div> <div>Consent</div> <div>Review and submit</div> </div> <div> <div>Assets you own</div> <div>Step 4 of 7</div> <div> <div>You can choose to hide certain income sources, assets, and properties from other borrowers in this application.</div> <div>Please add your assets</div> <div>Add an asset</div> <div>Finish adding assets</div> </div> </div> </div>	<div> <div>Step 4 - ASSETS : Report assets</div> <div> <div>Click <b>"Add an asset"</b></div> <div>List your bank accounts &amp; balances</div> <div>Investment holdings</div> <div>RRSP/TFSA</div> <div>Vehicles</div> <div>Gifts from immediate family member</div> </div> </div>
<div> <div> <div>Goal</div> <div>Borrowers</div> <div>Income</div> <div>Assets</div> <div>Properties</div> <div>Professionals</div> <div>Consent</div> <div>Review and submit</div> </div> <div> <div>Assets you own</div> <div>Step 4 of 7</div> <div> <div>You can choose to hide certain income sources, assets, and properties from other borrowers in this application.</div> <div> <div>Choose an asset *</div> <div>Vehicle</div> </div> <div>Who owns this asset? *</div> <div>Asset description</div> <div>2020, BMW, X5</div> <div>What is the approximate value or balance? *</div> <div>\$20,000</div> <div> <div>Hide this asset from other borrowers in the application?</div> <div>If yes, only the owners and your mortgage advisor will be able to see or edit any of the information you've entered.</div> <div> <div>Yes</div> <div>No</div> </div> <div>Save asset</div> <div>Cancel</div> </div> </div> </div> </div>	<div> <div>Click <b>"Save asset"</b></div> </div>

<div><div><div>Goal</div><div>Borrowers</div><div>Income</div><div>Assets</div><div>Properties</div><div>Professionals</div><div>Consent</div><div>Review and submit</div></div><div><div>Assets you own</div><div>Step 4 of 7</div><div><div>You can choose to hide certain income sources, assets, and properties from other borrowers in this application.</div><div><div>\$20,000</div><div>Hidden</div></div><div>Vehicle</div><div>Edit details</div></div><div><div>+ Add an asset</div><div>Finish adding assets</div></div></div></div>	<div>• Continue to add all your assets, and complete this step by clicking "<b>Finish adding assets</b>"</div>
<div><div><div>Goal</div><div>Borrowers</div><div>Income</div><div>Assets</div><div>Properties</div><div>Professionals</div><div>Consent</div><div>Review and submit</div></div><div><div>Properties you own</div><div>Step 5 of 7</div><div><div>You can choose to hide certain income sources, assets, and properties from other borrowers in this application.</div><div><div>3456 Princeton Avenue</div><div>Hidden</div></div><div>Coquitlam, BC, V3E 0G1</div><div>Edit details</div></div><div><div>+ Add a property</div><div>Finish adding properties</div></div></div></div>	<div>Step 5 - PROPERTIES : Properties You Own</div> <div>• Click "<b>Add a property</b>", and input all the details</div>
<div><div><div>Goal</div><div>Borrowers</div><div>Income</div><div>Assets</div><div>Properties</div><div>Professionals</div><div>Consent</div><div>Review and submit</div></div><div><div>Properties you own</div><div>Step 5 of 7</div><div><div>You can choose to hide certain income sources, assets, and properties from other borrowers in this application.</div><div><div>Add the address of this property</div><div><div>Street number*</div><div>3456</div><div>Province*</div></div><div><div>Street name*</div><div>Princeton</div></div><div><div>Street type*</div><div>Avenue</div><div>Street direction</div><div>Select</div></div><div><div>Unit</div><div>City*</div><div>Coquitlam</div></div><div><div>Province*</div><div>British Columbia</div><div>Country</div><div>Canada</div></div><div><div>Postal code*</div><div>V3E 0G1</div><div><a href="#">Clear address details</a></div></div></div><div><div>Select the borrower(s) / borrower(s) who own this property *</div><div><div>Myself only</div></div></div><div><div>How much is the property worth?</div><div><div>If you don't know the exact number, please estimate.</div><div>\$170,000</div></div></div><div><div>Will this property be sold before or during purchase?</div><div><div>Yes</div><div>No</div></div></div><div><div>What are the annual property taxes?</div><div>\$4,000</div></div><div><div>What are the monthly condo fees (if applicable)?</div><div>\$0</div></div></div></div></div>	

Goal

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Review and submit

How is this property being used?

Owner Occupied

Owner Occupied / Rental

☒ Rental / Investment

Second Home / Vacation Property

What is the rental income for this property each year?

\$40,000

Is your property still mortgaged?

☒ Yes

☐ No

Mortgage information

What is the current rate for this mortgage?

4.5%

How long is the term?

5 years

Mortgage rate type

☐ Fixed

☒ Variable

How often are payments made towards this mortgage?

Monthly

☒ Variable

How often are payments made towards this mortgage?

Monthly

How much is this mortgage payment?

\$3,500

Who is the lender?

BMO

What is the remaining mortgage balance left to pay?

\$280,000

When does the mortgage renew?

December012030

Add another mortgage

Hide this property from other borrowers in the application?

If yes, only the owners and your mortgage advisor will be able to see or add any of the information you've entered.

☒ Yes

☐ No

Save PropertyCancel

Goal

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Review and submit

Properties you own

Step 5 of 7

You can choose to hide certain income sources, assets, and properties from other borrowers in this application.

3456 Princeton Avenue

Coquitlam, BC, V3E 0G1

Edit details

Add a property

Finish adding properties

Click "Save Property"

Continue to "Add a property" if you have additional properties

When all properties have been added, complete this stage by clicking "Finish adding properties"

<div><div><div>Goal</div><div>Borrowers</div><div>Income</div><div>Assets</div><div>Properties</div><div><b>Professionals</b></div><div>Consent</div><div>Review and submit</div></div><div><div>Professionals</div><div>Step 6 of 7</div><div>Are you currently working with anyone?</div><div><div>Realtor</div><div><div>Full name *</div><div>John Smith</div></div><div><div>Email</div><div>js@realtor.ca</div></div><div><div>Phone number</div><div>Extension can be appended to the phone number eg. 555-555-5555 ext. 123</div><div>(604) 321-4567</div></div><div><div>Brokerage</div><div>remax</div></div><div><div>Remove</div></div><div><div>Save</div><div>Cancel</div></div></div></div></div>	<div>Step 6 - PROFESSIONALS : Input realtor and lawyer information</div> <div><div>• Input realtor and lawyer information (optional)</div><div>• Click "Save"</div></div>
<div><div><div>Consent</div><div>Review and submit</div></div><div><div>Real estate lawyer</div><div><div>Full name *</div><div>Jenny Bubble</div></div><div><div>Email</div><div>jb@lawyer.ca</div></div><div><div>Phone number</div><div>Extension can be appended to the phone number eg. 555-555-5555 ext. 123</div><div>6043215678</div></div><div><div>Fax</div><div>e.g. 555-555-5555</div></div><div><div>Law firm</div><div>Bubble LLP</div></div><div><div>Save</div><div>Cancel</div></div><div><div>Finish adding professionals</div></div></div></div>	
<div><div><div>Consent</div><div>Review and submit</div></div><div><div><div>Edit details</div></div><div><div>Real estate lawyer</div><div><div>Full name *</div><div>Jenny Bubble</div></div><div><div>Email</div><div>jb@lawyer.ca</div></div><div><div>Phone number</div><div>(604) 321-5678</div></div><div><div>Fax</div><div>-</div></div><div><div>Law firm</div><div>Bubble LLP</div></div><div><div>Edit details</div></div><div><div>Finish adding professionals</div></div></div></div></div>	<div>• Complete this step by clicking "Finish adding professionals"</div>



## Step 7 - CONSENT

- ✓ Goal
- ✓ Borrowers
- ✓ Income
- ✓ Assets
- ✓ Properties
- ✓ Professionals
- ☐ Consent
- ☐ Review and submit

### Sign client consent

Step 7 of 7

Your consent allows us to use the information provided to find the best financing option for you.

Client

⚠ You must read and sign your consent to submit the application

Read and sign consent

Finish adding consent

• Your consent allows us to use the information provided to find the best financing option for you

• Click "**Read and sign consent**"

- Professionals
- ☐ Consent
- ☐ Review and submit

Client consent

Please read and accept our online consent agreement by checking the box below.

E7 Mortgage

#### CLIENT CONSENT AGREEMENT

I/we warrant and confirm that the information given in the mortgage application form to E7 Mortgage is true and correct and I/we understand that it is being used to determine my/our credit responsibility and to evaluate and respond to my/our request for mortgage financing. You are authorized to obtain any information you may require for these purposes from other sources (including, for example, credit bureaus) and each source is hereby authorized to provide you with such information. I/we also understand, acknowledge and agree that the information given in the mortgage application form as well as other information you obtain in relation to my/our credit history may be disclosed to potential lenders.

☒ I, Client, agree to the above client consent, checking this box is a digital signature.

Give consent

Finish adding consent

• Check the agreement box, and click "**Give consent**"

- ✓ Goal
- ✓ Borrowers
- ✓ Income
- ✓ Assets
- ✓ Properties
- ✓ Professionals
- ☐ Consent
- ☐ Review and submit

### Sign client consent

Step 7 of 7

Your consent allows us to use the information provided to find the best financing option for you.

Client

✓ Client consent

[View Consent PDF](#)

Finish adding consent

• Click "**Finish adding consent**" to complete this step

<div><div><div>Goal</div><div>Borrowers</div><div>Income</div><div>Assets</div><div>Properties</div><div>Professionals</div><div>Consent</div><div>Review and submit</div></div><div><div>Review application</div><div>Almost there!</div><div><div>1</div><div>Your goal is to purchase a Home</div><div>Purchase Price</div><div>\$950,000</div><div>Edit details</div></div><div><div>2</div><div>Borrowers on the mortgage</div><div>Client</div><div>123@gmail.com</div><div>(504) 957-6543</div><div>Account status: Active</div><div>Edit details</div></div><div><div>3</div><div>Income history of borrowers</div><div>Client</div><div>\$70,000</div><div>Employed: 2020-01-01 - Current</div><div>Edit details</div></div><div><div>4</div><div>Assets you own</div><div>\$20,000</div><div>Vehicle</div><div>Client</div><div>Edit details</div></div></div></div>	<div>Step 8 - REVIEW &amp; SUBMIT</div> <div><div>Final step. Review all the sections for accuracy</div></div>
<div><div><div>Income</div><div>Assets</div><div>Properties</div><div>Professionals</div><div>Consent</div><div>Review and submit</div></div><div><div>Properties you own</div><div>3456 Pineapple Avenue</div><div>Couplins, BC, V6E 9P1</div><div>Edit details</div></div><div><div>Professionals</div><div>John Smith</div><div>jsmith@abc.com</div><div>(604) 321-4567</div><div>Edit details</div></div><div><div>Jenny Bubble</div><div>jbubble@def.com</div><div>(604) 321-5678</div><div>Edit details</div></div><div><div>Consent</div><div>Client</div><div>Client consent</div><div>View Consent PDF</div></div><div><div>Is there anything else you'd like to tell us about your application?</div><div>Enter comments</div></div><div><div>Finish and submit application</div></div></div>	<div><div>Click "<b>Finish and submit application</b>" to complete your mortgage application</div><div>You will receive an email to confirm your mortgage application submission</div><div>Follow the instructions on the email and click "<b>Upload documents</b>"</div></div>