Residential Purchase Transaction Questionnaire

Important note: Please complete this questionnaire carefully and provide supporting documents where available. If you are unsure of an answer, do not guess. Discuss it with your lawyer. If there are more than two purchasers, please complete an additional questionnaire.

1. Purchaser and contact information

Question	Purchaser 1 Response	Purchaser 2 Response
Full legal name		
Middle name(s), if any		
Date of birth		
Marital status of each purchaser	☐Single ☐ Married ☐ Common law ☐ Separated ☐ Divorced ☐ Widowed	☐Single ☐ Married ☐ Common law ☐ Separated ☐ Divorced ☐ Widowed
Current mailing address		
Preferred phone number		
Preferred email address		
Employer, occupation, and work address		

2. Identity, residency, and bankruptcy status

Question	Purchaser 1 Response	Purchaser 2 Response
Is each purchaser a resident of Canada for tax purposes?	☐ Yes ☐ No	☐ Yes ☐ No
What is each purchaser's current status in Canada?	☐ Canadian citizen ☐ Permanent resident ☐ Visa holder ☐ No legal status ☐ Other	☐ Canadian citizen ☐ Permanent resident ☐ Visa holder ☐ No legal status ☐ Other
Are you a resident or citizen of any other country? If yes, identify the country.	☐ Yes ☐ No Country:	☐ Yes ☐ No Country:
Have you been in Canada for more than 183 days within the last 12 months?	☐ Yes ☐ No	☐ Yes ☐ No

Question	Purchaser 1 Response	Purchaser 2 Response
Bankruptcy status of each purchaser	☐ Never declared ☐ Undischarged ☐ Discharged	☐ Never declared ☐ Undischarged ☐ Discharged
Government-issued identification to be provided	☐ Driver's licence ☐ Passport ☐ Other:	☐ Driver's licence ☐ Passport ☐ Other:

3. First-time home buyer information

Question	Purchaser 1 Response	
Is each purchaser a first-time home buyer?	☐ Yes ☐ No ☐ Unsure	☐ Yes ☐ No ☐ Unsure
Has either purchaser ever owned a home anywhere in the world?	☐ Yes ☐ No Details:	☐ Yes ☐ No Details:
Has either purchaser been married to or lived common law with someone who owned a home during the relationship?	☐ Yes ☐ No Details:	☐ Yes ☐ No Details:

4. Property and agreement details

Question	Purchaser 1 Response	Purchaser 2 Response
Municipal address of the property being purchased		
Type of property	☐ Single-family ☐ Duplex ☐ 2–6 unit ☐ Condominium unit ☐ Parcel of tied land ☐ Vacant lot ☐ Other:	☐ Single-family ☐ Duplex ☐ 2–6 unit ☐ Condominium unit ☐ Parcel of tied land ☐ Vacant lot ☐ Other:
Approximate age of the property		
Provide a complete signed copy of the Agreement of Purchase and Sale, schedules, waivers, amendments, notices, and extensions	☐ Provided ☐ To follow	☐ Provided ☐ To follow

Question	Purchaser 1 Response	Purchaser 2 Response
Have there been any changes to the Agreement of Purchase and Sale after signing?	☐ Yes ☐ No If yes, describe and provide documents:	☐ Yes ☐ No If yes, describe and provide documents:
Is the seller a non-resident of Canada?	☐ Yes ☐ No ☐ Do not know	☐ Yes ☐ No ☐ Do not know

5. Intended use and occupancy

Question	Response
How will the property be used after closing?	☐ I/we will live in the property ☐ Immediate family member will live there ☐ Investment property
If an immediate family member will occupy the property, state the relationship	
If this is an investment property, provide the mailing address for notices and correspondence	
Is the property presently occupied or vacant?	☐ Seller-occupied ☐ Tenant-occupied ☐ Vacant ☐ Do not know
Are you assuming any rental or service contracts (i.e. HVAC, security system, solar panels, hot water tank) under the Agreement of Purchase and Sale?	☐ Yes ☐ No If yes, for what:

6. Property services, condition, and planned improvements

Question	Response
Waste connection	☐ Septic system ☐ Municipal sewer ☐ Do not know
Water source	☐ Private well ☐ Municipal water ☐ Do not know

Question	Response
Primary heating source	☐ Oil ☐ Gas ☐ Electricity ☐ Wood ☐ Other:
Have you arranged for or received a property inspection?	☐ Yes ☐ No Report provided: ☐ Yes ☐ To follow
For a condominium purchase, have you received a status certificate?	☐ Yes ☐ No ☐ Not applicable
Do you plan improvements or renovations within 12 months after closing that may increase the property's value?	☐ Yes ☐ No If yes, describe:
Estimated future value of the land and improvements	$

7. Financing and source of funds

Question	Response
Will you be financing the purchase?	☐ Yes ☐ No
Mortgage broker name and contact information	
Lender name and contact information	
Does the lender require a guarantor?	☐ Yes ☐ No If yes, guarantor name:
Source of funds. Select all that apply.	☐ Personal account ☐ Sale proceeds ☐ Mortgage ☐ Third party Other:
If a third party is providing funds, provide the person's name, relationship to you, amount, and whether the funds are a gift or loan	

8. Related sale and bridge financing

Question	Response
Are you selling another property and using the sale proceeds for this purchase?	☐ Yes ☐ No

Question	Response
Will the sale and purchase close on the same day?	☐ Yes ☐ No ☐ Not applicable
If not, will you obtain bridge financing?	☐ Yes ☐ No ☐ Unsure ☐ Not applicable
Related sale property address and lawyer/file information, if applicable	

9. How title will be held

Joint tenants means that if a co-owner dies, the surviving joint co-owner or co-owners acquire the deceased's share of the property

Tenants in common means that if a co-owner dies, their ownership interest does not automatically pass to the other owner or owners. The deceased's share of the property becomes part of their estate.

Question	Response
Proposed ownership	☐ Sole owner ☐ Joint tenants ☐ Tenants in common ☐ Unsure
If tenants in common, proposed ownership shares	Purchaser 1: % Purchaser 2: %
Additional instructions or estate-planning concerns to discuss with the lawyer	

10. Closing and signing logistics

Question	Response
Will all purchasers be available to sign the closing documents before completion?	☐ Yes ☐ No If no, provide details:
Will all purchasers be in the city for signing?	☐ Yes ☐ No
Are participating in a relocation program? If yes, provide the program and file number	☐ Yes ☐ No

Question	Response
Property insurance contact / policy information	Insurer: Broker/agent: Policy no.:
Questions or concerns you want to raise with the lawyer	

11. Documents to provide

- ☐ Complete signed Agreement of Purchase and Sale, schedules, amendments, waivers, notices, and extensions
- ☐ Government-issued identification for each purchaser, as requested by the lawyer
- ☐ Mortgage or financing instructions and lender or broker contact information
- ☐ Evidence of the source of funds, including details of any third-party gift or loan
- ☐ Property inspection report and condominium status certificate, if applicable
- ☐ Documents relating to a connected sale or bridge financing, if applicable
- ☐ Relocation program information, if applicable
- ☐ Property insurance binder or confirmation, as requested by the lender or lawyer

12. Purchaser acknowledgement

- ☐ I/we confirm that the information provided is complete and accurate to the best of my/our knowledge.
- ☐ I/we will promptly tell the lawyer if any information changes before closing.

Question	Response
Purchaser 1	Name: Signature: Date:
Purchaser 2	Name: Signature: Date: