Residential Sale 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 sellers, please complete an additional questionnaire.

1. Seller and contact information

Question	Seller 1 Response	Seller 2 Response
Full legal name		
Middle name(s), if any		
Date of birth		
Marital status of each seller	☐Single ☐ Married ☐ Common law ☐ Separated ☐ Divorced ☐ Widowed	☐Single ☐ Married ☐ Common law ☐ Separated ☐ Divorced ☐ Widowed
Current mailing address		
Preferred phone number		
Preferred email address		
Is any seller signing under a power of attorney? If yes, provide a copy of the power of attorney.	☐ Yes ☐ No	☐ Yes ☐ No

2. Property and agreement details

Question	Response
Municipal address of the property being sold	
Legal description, if available	
MLS number, if applicable	
Sale price	$
Deposit amount and name of deposit holder	$
Scheduled closing date	

Is the transaction conditional? If yes, list all conditions and deadlines	☐ Yes ☐ No If yes, provide details:
Provide a complete signed copy of the Agreement of Purchase and Sale, all schedules, waivers, amendments, notices, and extensions	☐ Provided ☐ To follow

3. Mortgages, liens, and payouts

Question	Response
List all mortgages, secured lines of credit, or charges registered against the property	
Name of lender, account/reference number, and contact information	
Is any mortgage portable, assumable, blended, or subject to discharge penalties?	☐ Yes ☐ No If yes, provide details:
Are there any construction liens, judgments, writs, executions, tax arrears, or other claims affecting title?	☐ Yes ☐ No ☐ Unknown If yes, provide details:
Are there any private mortgages or family loans secured against the property?	☐ Yes ☐ No If yes: ☐ Private mortgage ☐ Loans ☐ Other Provide details:
Provide recent mortgage statements and payout contact details	

4. Occupancy, tenancies, and vacant possession

Question	Response
Is the property owner-occupied, rented, vacant, or occupied by someone else?	☐ Occupied by Seller 1 ☐ Occupied by Seller 2 ☐ Rented ☐ Vacant ☐ Other

If the property is vacant, how long has it been vacant?	
Reason for vacancy	
Provide a copy of the latest vacancy status declaration filed with the municipality	
If rented, provide copies of all leases, rent amounts, deposits, notices, and tenant contact information	
Has the buyer been promised vacant possession?	☐ Yes ☐ No
If yes, what steps have been taken to ensure vacant possession by closing?	
Are there basement apartments, secondary suites, rooming arrangements, short-term rentals, or licence arrangements?	☐ Yes ☐ No If yes, describe:
Are there any disputes with tenants, occupants, neighbours, or condominium management?	☐ Yes ☐ No If yes, provide details:

5. Adjustments and ongoing property costs

Question	Response
Annual property taxes and current payment status	☐ Paid and up to date ☐ In arrears If in arrears, provide details:
Are property taxes paid directly, through a mortgage lender, or on a pre-authorized plan?	☐ Directly ☐ Mortgage lender ☐ Pre-authorized
Provide the most recent property tax bill and proof of payment	
List all utilities and service providers, including account numbers where available	
Are there prepaid expenses, fuel oil/propane tanks, rental payments, or local improvement charges to adjust on closing?	☐ Yes ☐ No If yes, describe:
Are there arrears for taxes, utilities, condominium fees, or other property-related charges?	☐ Yes ☐ No If yes, provide details:

6. Chattels, fixtures, rentals, and contracts

Question	Response
List all chattels included in the sale, such as appliances, window coverings, remotes, and fixtures	
List all excluded items that will be removed before closing	
Are any items rented, leased, financed, or subject to a service contract?	☐ Yes ☐ No If yes, provide details:
If yes, provide contracts for hot water tank, HVAC, water softener, security system, solar panels, hot water tank, or other equipment	
Does the buyer assume any rental or service contracts under the Agreement of Purchase and Sale?	☐ Yes ☐ No If yes, for what:
Are any warranties, manuals, keys, fobs, mailbox keys, garage remotes, or access cards to be delivered?	☐ Warranties ☐ Manuals ☐ Keys ☐ Fobs ☐ Garage Remotes ☐ Access cards ☐ Other

7. Condominium-related questions

Question	Response
Is the property a condominium, common elements condominium, parcel of tied land, co-operative, or other shared ownership arrangement?	☐ Yes ☐ No
If yes, provide the name and number of the condominium corporation and the name and contact information of the property management company	
Monthly common expenses and current payment status	$ ☐ Paid up to date ☐ In arrears If in arrears, provide details:

Are there special assessments, increases, arrears, legal proceedings, reserve fund concerns, or known rule violations?	☐ Yes ☐ No If yes, provide details:
Provide status certificate, if ordered or available, and any related condominium documents	
List parking, locker, storage, bike rack, or exclusive-use areas included in the sale	

8. Property condition

Question	Response
Are you aware of any water penetration, flooding, sewer backup, roof leaks, mould, moisture, drainage, grading, or foundation issues?	☐ Yes ☐ No If yes, provide details:
Are you aware of structural problems, settlement, major repairs, fire damage, pest infestation, or environmental concerns?	☐ Yes ☐ No If yes, provide details:
Are you aware of asbestos, urea formaldehyde foam insulation, lead, radon, fuel tanks, contaminated soil, or other hazardous substances?	☐ Yes ☐ No If yes, provide details:
Are you aware of aluminum wiring, knob-and-tube wiring, plumbing deficiencies, electrical deficiencies, HVAC issues, or open permits?	☐ Yes ☐ No If yes, provide details:
Have there been renovations, additions, basement apartments, decks, pools, fences, or structural changes? If yes, provide permits, inspections, invoices, warranties, and completion details	☐ Yes ☐ No If yes, provide details:
Are you aware of boundary, encroachment, easement, right-of-way, survey, zoning, conservation authority, heritage, or municipal work order issues?	☐ Yes ☐ No If yes, provide details:
Have there been insurance claims, inspections, engineer reports, environmental reports, or contractor assessments relating to the property?	☐ Yes ☐ No If yes, provide details:

9. Identity, residency, and bankruptcy status

Question	Seller 1 Response	Seller 2 Response
Is each seller a resident of Canada for tax purposes?	☐ Yes ☐ No	☐ Yes ☐ No
If any seller is a non-resident or may become a non-resident before closing, provide details immediately		
Has the property been used for business, rental, Airbnb/short-term rental, farming, or mixed residential/commercial purposes?	☐ Yes ☐ No If yes, provide details:	☐ Yes ☐ No If yes, provide details:
Has the property been substantially renovated, newly built, or converted in a way that may raise HST questions?	☐ Yes ☐ No If yes, describe:	☐ Yes ☐ No If yes, describe:
Will each seller claim the principal residence exemption?	☐ Yes ☐ No	☐ Yes ☐ No
Has each seller obtained accounting advice regarding tax reporting, capital gains, HST, or non-residency withholding?	☐ Yes ☐ No If yes, describe:	☐ Yes ☐ No If yes, describe:
Government-issued identification to be provided	☐ Driver's licence ☐ Passport ☐ Other:	☐ Driver's licence ☐ Passport ☐ Other:

10. Closing logistics

Question	Response
Where should net sale proceeds be paid?	
Provide void cheque or direct deposit information, if requested by lawyer	
Will sale proceeds be used for a purchase closing? If yes, provide the purchase property address, closing date, and lawyer/file information	☐ Yes ☐ No

Are there special timing requirements, bridge financing, moving arrangements, or holdback issues?	☐ Yes ☐ No If yes, provide details:
Who will deliver keys, fobs, remotes, alarm codes, mailbox keys, and access items?	☐ Seller ☐ Realtor ☐ Lockbox ☐ Other
Has home insurance been arranged to remain in place until the day after the closing date?	☐ Yes ☐ No If no, please call your home insurer

11. Documents to provide

- ☐ Agreement of Purchase and Sale, schedules, amendments, waivers, notices, and extensions
- ☐ Current mortgage or line of credit statements and lender contact information
- ☐ Most recent property tax bill and proof of payment
- ☐ Copy of latest vacancy tax status declaration filed with the municipality
- ☐ Utility account information and details of prepaid or outstanding charges
- ☐ Rental, lease, financing, warranty, and service contracts for equipment or systems
- ☐ Condominium status certificate and related documents, if applicable
- ☐ Leases, notices, rent deposit information, and tenant correspondence, if applicable
- ☐ Survey, title insurance policy, permits, inspection reports, invoices, warranties, and repair records
- ☐ Government-issued identification for each seller, as requested by the lawyer
- ☐ Banking information for net sale proceeds

12. Seller 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
Seller 1	Name: Signature: Date:
Seller 2	Name: Signature: Date: