



Optional Intake Form – Ontario¹

Once completed, please fax to 416-599-8341 or 1-800-286-7639.

If you need assistance completing this form, please call us at 416-598-5899 or 1-800-410-1013.

Date and Time Clients to Sign Documents (if available):

Check one: <input type="checkbox"/> Mortgage-Only <input type="checkbox"/> Purchase (with or without mortgage)
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Lawyer Information	Response
Lawyer's Name	
Law Society Number	
Firm	
Address	
Telephone Number	
Facsimile Number	
E-mail Address	
Assistant or Contact Name	

Basic Information	Response
Your Internal File Number	
Name of all purchasers and how they are taking title. If mortgage-only, name(s) of borrower(s).	
Vendor's Name (if purchase)	
Expected Closing Date	
Purchase Price	
For this transaction, are you or your firm performing mortgage brokering, lending or administration services which require a licence under the Mortgage Brokerages, Lenders and Administrators Act, 2006 (the " <i>Act</i> ")?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If "yes," do you have the required licence under the <i>Act</i> ?	<input type="checkbox"/> Yes <input type="checkbox"/> No – not eligible for TitlePLUS® coverage
Is the purchaser buying or mortgaging a fee simple interest?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you (or any other member of your firm) have a direct or indirect financial or ownership interest in the transaction?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Are you acting for both the purchaser and vendor in this transaction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the property a new home?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Title to the Property is located in	<input type="checkbox"/> Land Titles <input type="checkbox"/> Registry
Property's Full Municipal Address	
PIN Number (if available)	
Assessment Roll Number (if available)	
Legal Description (if metes and bounds description, please include only lot or part lot, plan, last instrument number, municipality and region, county or district)	
Is water service municipal, or is water obtained from a well or other source?	<input type="checkbox"/> Municipal <input type="checkbox"/> Well/Other Source
Is the sewer service municipal or is there a septic system?	<input type="checkbox"/> Municipal <input type="checkbox"/> Septic System
The property will only be used for residential purposes	<input type="checkbox"/> Correct <input type="checkbox"/> Incorrect
The property contains at least one (1) but no more than four (4) residential dwellings, or is vacant land intended for residential use	<input type="checkbox"/> Correct <input type="checkbox"/> Incorrect
The property is not a timeshare, co-operative, or co-ownership building	<input type="checkbox"/> Correct <input type="checkbox"/> Incorrect – not eligible for TitlePLUS coverage

If there is a mortgage being taken on the LAND, please complete the following section(s):

Mortgage Information (First Mortgage)	Response
Is the Mortgage	<input type="checkbox"/> Conventional <input type="checkbox"/> Insured High Ratio <input type="checkbox"/> Line of Credit/Collateral <input type="checkbox"/> Construction Loan <input type="checkbox"/> Vendor Take-Back – not eligible for TitlePLUS coverage <input type="checkbox"/> Assumed – not eligible for TitlePLUS coverage
Mortgage Lender	
Principal Amount of Mortgage (\$ Cdn)	
Maturity Date of Mortgage	
Mortgage Reference Number	
Interest Rate	
Name of Guarantor	

Mortgage Information (Second Mortgage)	Response
Is the Mortgage	<input type="checkbox"/> Conventional <input type="checkbox"/> Insured High Ratio <input type="checkbox"/> Line of Credit/Collateral <input type="checkbox"/> Construction Loan <input type="checkbox"/> Vendor Take-Back – not eligible for TitlePLUS coverage <input type="checkbox"/> Assumed – not eligible for TitlePLUS coverage
Mortgage Lender	
Principal Amount of Mortgage (\$ Cdn)	
Maturity Date of Mortgage	
Mortgage Reference Number	
Interest Rate	
Name of Guarantor	

Other Questions	Yes	No	Details
Is the property serviced by hydro?			
Is the property serviced by natural gas?			
Are there any tenants in the property? If “yes,” are any of them being assumed?			If tenants being assumed, provide details of tenancies, except tenants’ names.
If tenants are being assumed on closing, does the client want an opinion on the legality of rents? (If “yes,” additional searches will be required.)			
Does the property have more than one unit? If “yes,” does the client want clearance for multiple unit use, Fire Code and Hydro One? (If “yes,” additional searches will be required.)			
Do you have any concerns that the applicable zoning by-law may limit the purchaser’s ability to occupy the property year-round?			
Do you have any concerns about access to the property?			
Is the property abutting a lake, river or other body of water?			

Other Questions	Yes	No	Details
<p>For properties OTHER THAN condominiums:</p> <ul style="list-style-type: none"> • Does the purchaser intend to undertake any changes to the use of or structure on the property? • Is there an up-to-date survey for the property? • Is there an existing (but not up-to-date) survey for the property? • Have there been any changes to the property (decks, pools, additions or other) since the survey was prepared? • If there is no survey and the property is a part lot in Registry, can you obtain Declaration(s) of Possession covering at least ten (10) continuous years, before closing? 			
<p>For properties OTHER THAN condominiums and whole lots on plans:</p> <ul style="list-style-type: none"> • Are there any hydro transmission towers/wires on or near the property? • Does the property front on a highway? • Are there any waterways, ravines or other environmental features on or near the property? • Is your Building Department work order search clear or in the alternative have you obtained a home inspection report for the property? 			

Please note that a TitlePLUS representative will call you to complete your application. Please have all the title and off-title information for the property ready. Be sure to advise the TitlePLUS representative of any adverse information revealed by your inquiries or otherwise in your possession.

¹ The TitlePLUS policy is underwritten by Lawyers' Professional Indemnity Company.

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(January 2010)