



Optional Intake Form – All Provinces and Territories Except Ontario and Québec¹

Once completed, please fax to 1-800-286-7639.

In Manitoba, contact Reider Insurance Services at 204-338-3888.

In Alberta, contact Phoenix Group Edmonton Inc. at 780-482-6936 or 1-800-563-5325.

LAWYER INFORMATION	RESPONSE
Lawyer's Name	
Law Society Number	
Firm	
Address	
Telephone Number	
Facsimile Number	
E-mail Address	
Assistant or Contact Name	
Date and Time clients to sign documents (if known)	

BASIC INFORMATION	RESPONSE	
The transaction is a	<input type="checkbox"/> Purchase (with or without mortgage) <ul style="list-style-type: none"> ▪ Newly constructed dwelling? Yes/No <input type="checkbox"/> Mortgage only (no purchase is occurring)	
I am not acting as mortgage broker in this deal.	<input type="checkbox"/> Correct	<input type="checkbox"/> Incorrect
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?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Your Internal File Number		

BASIC INFORMATION	RESPONSE	
Purchase Price		
Expected Closing Date		
Names of all Purchaser(s)	<input type="checkbox"/> Joint Tenants (50% each or other: _____) <input type="checkbox"/> Tenants in Common (50% each or other: _____)	
Vendor's Name		
Property's Full Municipal Address		
Realty Tax Account Number (if any)		
Property Identification Number (if any) (from land registration system)		
Legal Description (if lengthy metes and bounds description, please attach)	<input type="checkbox"/> Registry Fee Simple <input type="checkbox"/> Land Titles Fee Simple <input type="checkbox"/> Previously unregistered land	
Property will only be used for residential purposes.	<input type="checkbox"/> Correct	<input type="checkbox"/> Incorrect
Property is not a timeshare or co-operative building.	<input type="checkbox"/> Correct	<input type="checkbox"/> Incorrect
How many dwelling units on the property? (Maximum number of units: 4. Each condominium unit, accessory apartment or boarding/lodging room constitutes its own dwelling unit for the purposes of this question.)	<input type="checkbox"/> One <input type="checkbox"/> Two to Four <input type="checkbox"/> Vacant Land intended for residential use If 2 to 4 units, does purchaser and/or lender want clearance for multiple unit use and related legal issues? Yes/No	

If the transaction involves MORTGAGE FINANCING, please complete this page:

Mortgage Information (1st 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	
Mortgagee(s)		
Principal of Mortgage (in Cdn funds)		
Maturity Date of Mortgage		
Mortgage Reference Number		
Interest Rate		
Any Guarantor?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Mortgage Information (2nd 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	
Mortgagee(s)		
Principal of Mortgage (in Cdn funds)		
Maturity Date of Mortgage		
Mortgage Reference Number		
Interest Rate		
Any Guarantor?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

ADDITIONAL QUESTIONS	RESPONSE	
Water Service	<input type="checkbox"/> Municipal	<input type="checkbox"/> Private
Sewer Service	<input type="checkbox"/> Municipal	<input type="checkbox"/> Private
Applicable if utilities have lien rights over property in province/area where land located: Is the property serviced by: hydro? gas?	<input type="checkbox"/> N/A <input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> No
For properties OTHER THAN condominiums: Does the purchaser intend to undertake any changes to the use of or structures on the property? Is there a survey for the property? If “yes,” are you aware of any defects in the property revealed by the survey or any other source? If “no,” is there, or will there be on closing, a Declaration of Possession for the property?	<input type="checkbox"/> Yes <input type="checkbox"/> New <input type="checkbox"/> None <input type="checkbox"/> Yes <input type="checkbox"/> Yes – # of years covered: _____	<input type="checkbox"/> No <input type="checkbox"/> Existing – Have there been any changes (decks, pools, additions) since survey? Yes/No <input type="checkbox"/> No <input type="checkbox"/> No
Are there any tenancies currently affecting the property? If “yes,” continuing after closing?	<input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> No
Is the property abutting a lake, river or other body of water?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
For properties OTHER THAN condominiums and whole lots on multi-lot subdivision/development plans: Are there any hydro transmission towers/lines on or near the property? Are there any waterways, ravines or other significant physical features on the property or in the area? Does the property front on a highway or controlled access road? Is there a home inspection report for the property? (If “yes” and want to avoid building/zoning search, obtain copy from client.)	<input type="checkbox"/> Yes <input type="checkbox"/> Yes <input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> No <input type="checkbox"/> No <input type="checkbox"/> No
Is there a legal right of access to and from the property (for example, via a public road or registered right-of-way)? Water access only?	<input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> No

¹ The TitlePLUS policy is underwritten by Lawyers’ Professional Indemnity Company.
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(January 2010)