



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 at 204-956-7300.

In Alberta, contact HUB International Phoenix Insurance Brokers at 780-482-6936 or 1-800-563-5325.

Lawyer information	Response
Lawyer's Name	
LAWPRO 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"> <input type="checkbox"/> 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
Has another title insurance company declined to provide title insurance for this transaction?	<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?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Basic Information	Response	
Is the property being purchased: (a) from a mortgage lender that foreclosed; (b) under a court sale; (c) under a judgment or writ; (d) from CMHC or another mortgage insurer, such as Genworth Financial; (e) from a mortgage lender under power of sale; (f) from a trustee in bankruptcy or receiver; (g) under a tax sale (e.g., a sale by a municipality for arrears of property taxes); or (h) from the federal or provincial government, if it obtained title by forfeiture.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Your Internal File Number		
Purchase Price (if new home purchased from builder, include applicable taxes)		
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		
Property 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"/> Land Titles Fee Simple <input type="checkbox"/> Registry Fee Simple <input type="checkbox"/> Previously unregistered land (NL only)	
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

Basic Information	Response
How many dwelling units on the property? (Maximum number of units: six (6). Each secondary suite or basement apartment or boarding/lodging room constitutes a dwelling unit for the purposes of this question.)	<input type="checkbox"/> One <input type="checkbox"/> Two to Six <input type="checkbox"/> Vacant Land intended for residential use If 2 to 6 units, does purchaser and/or lender want coverage for building issues, zoning or Fire work orders? <input type="checkbox"/> Yes <input type="checkbox"/> No (if you answered "Yes," additional searches will be required)
If two (2) to six (6) dwelling units, is Licensing/Registration required by municipality?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If "yes," licence/registration/permit obtained?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If two (2) to six (6) dwelling units and property is a boarding, lodging or rooming house, licence obtained?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any concerns that the applicable zoning by-law may limit the purchaser's ability to occupy the property year-round?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Risk Management Questions	Response
Date of Last Transfer (n/a if new home)	
If transfer within the past two years, were parties at arm's length?	<input type="checkbox"/> Yes – provide consideration amount: <input type="checkbox"/> No
Mortgage Discharges (n/a if new home) - Has a mortgage discharge (other than for a builder's mortgage) been registered in the six months preceding the closing/advance date?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Name of Mortgage Broker (if applicable)	

For Mortgage-Only Applications	Response
The mortgage proceeds are being paid to (check all that apply)	<input type="checkbox"/> An approved recipient. "Approved recipient" means: <ul style="list-style-type: none"> • the borrower or a spouse, child or parent of the borrower who is guaranteeing the mortgage; • the holder of a prior registered mortgage, lien or other encumbrance, in accordance with a payout statement; • the holder of an execution, writ or judgment binding the property, in accordance with a payout statement; • a municipality, government authority, utility supplier or condominium corporation; • a bank, trust company, insurance company, credit union, caisse populaire or credit card issuer for debts owed by the borrower or a spouse, child or parent of the borrower who is guaranteeing the mortgage; • a builder or material supplier, if the mortgage is a construction mortgage; or • another solicitor in trust: <ul style="list-style-type: none"> ○ where the solicitor gives a written undertaking to make the mortgage proceeds payable to an approved

	<p>recipient as defined above; or</p> <ul style="list-style-type: none"> ○ in furtherance of a purchase deal where the solicitor acts for the borrower in the purchase of real property. <p><input type="checkbox"/> A non-approved recipient.</p>
--	---

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

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)	
Is this a Private Lender?	<input type="checkbox"/> Yes <input type="checkbox"/> No A “Private Lender” is not a/n: (a) bank, trust company, insurance company, credit union or caisse populaire; (b) lender approved for mortgage underwriting under the National Housing Act; (c) lender regulated by OSFI or a provincial or territorial regulatory body; (d) lender whose shares are listed on a stock exchange within or outside Canada that is a designated stock exchange for the purposes of the Income Tax Act; (e) mortgage investment corporation under the Income Tax Act; or (f) affiliate of one of the above. For questions about specific lenders, please contact us.
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

Mortgage Information (2 nd Mortgage)	Response	
Mortgagee(s)		
Is this a Private Lender?	<input type="checkbox"/> Yes <input type="checkbox"/> No A “Private Lender” is not a/n: (a) bank, trust company, insurance company, credit union or caisse populaire; (b) lender approved for mortgage underwriting under the National Housing Act; (c) lender regulated by OSFI or a provincial or territorial regulatory body; (d) lender whose shares are listed on a stock exchange within or outside Canada that is a designated stock exchange for the purposes of the Income Tax Act; (e) mortgage investment corporation under the Income Tax Act; or (f) affiliate of one of the above. For questions about specific lenders, please contact us.	
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 NL and PE Purchase Transactions only: For properties other than condominiums, survey coverage is available if property is a “whole lot” for TitlePLUS purposes, or there is an existing location certificate/real property report reviewed by purchaser for accuracy or vendor providing statutory declaration commenting on accuracy. Is there a location certificate/real property report? Have there been any changes (e.g., decks, pools, additions) since location certificate/real property report prepared?	<input type="checkbox"/> None <input type="checkbox"/> Yes	<input type="checkbox"/> New, or <input type="checkbox"/> Existing <input type="checkbox"/> No

<p>For all provinces:</p> <p>Is there a survey/location certificate/real property report for the property?</p> <p>If there is a survey/location certificate/real property report, does it disclose any defects or problems? If “Yes,” please list below:</p>	<input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> No
<p>Does the purchaser intend to undertake any changes to the use of or structures on the property?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Are there any tenancies currently affecting the property? If “yes,” continuing after closing?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> No
<p>Is the property abutting a lake, river or other body of water?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>For properties OTHER THAN condominiums:</p> <p>Are there any hydro transmission towers/lines on or near the property?</p> <p>Are there any waterways, ravines or other significant physical features on the property or in the area?</p> <p>Does the property front on a highway or controlled access road?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> No <input type="checkbox"/> No
<p>Is there a legal right of access to and from the property (for example, via a public road or registered right-of-way)?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p>Water access only?</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No

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 (LAWPRO[®]). Different search requirements apply to transactions over \$1 million. Please call the TitlePLUS Customer Service Centre for details. The TitlePLUS program does not insure transactions over \$5 million.
 © 2017 Lawyers’ Professional Indemnity Company [®] Registered trademark of Lawyers’ Professional Indemnity Company.
 (January 10, 2017)