

# Loan Application Document Checklist

Help us process your loan request faster by providing us with the documents listed below.

*How do you earn your money?* (Required for all loans and mortgages)

## I'm a Salaried Employee

If your salary is very consistent throughout the year, and it has been directly deposited into a Coast Capital Savings account for more than two consecutive months, then you don't need anything else. Otherwise, please provide any two of the following:

- Either a T4, or Income Tax Return (T1G), or Notice of Assessment (NOA), **and**
- Current year-to-date pay stub within the last month (must show year-to-date income), or
- Current job letter, or
- Proof of direct deposit into another Financial Institution (bank statements with a minimum of 2 months consistent direct deposit income)

## I'm Self-Employed

You will need to provide the last two years' Notice of Assessment (NOA) and then, you will need to bring the following:

**Not Incorporated:** Last two years' Income Tax Return (T1G)

**Incorporated:** Last two years' Financial Statements (accountant prepared) and Corporation Notice of Assessment

## I Earn Commission Income

- Last two years' Notice of Assessment (NOA), and
- Most current pay stub (you will not need this if your salary is very consistent throughout the year, and it has been directly deposited into a Coast Capital Savings account for more than two consecutive months)

---

## *I need an unsecured loan or line of credit*

- Recent statements for items to be paid out (e.g. credit card statement, large item statement, if applicable)
- Recent mortgage balance statement (if mortgage is not with Coast Capital Savings)
- Asset verification (see below)

---

## *What do you own?*

Asset verification - Please provide information for any assets you may hold.

**Real Estate:** Current BC Property Tax Assessment(s) & mortgage balance statement(s)\*

**Investments:** Current statement(s) for RRSP, GICs, mutual funds, etc.\*\*

**Protection:** Tell us about your current life and health insurance coverages.

**Vehicles:** Detailed listing of all vehicles owned, including recreational

\*If mortgage is not with Coast Capital Savings.

\*\*If investments are not with Coast Capital Savings.

This checklist is for informational purposes only and does not signify formal approval.

Additional information may be required depending on the application.

The collection, use and disclosure of the personal information in this document is governed by the Coast Capital Savings Privacy Policy (a copy of which is available at any branch or online at coastcapitalsavings.com).