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 Tax Assessment (NOA), and
- Current year to date pay stub within the last month (must show year-to-date income)
- a current job letter
- 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 Tax 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 Corporate Notice of Tax Assessment

**I Earn Commission Income**

- Last two years’ Notice of Tax 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 a mortgage**

**I’m purchasing a new home** *(please also provide documents from the home equity section)*

- Real estate purchase contract (including property disclosure statement)
- Real estate sale contract (if residence has been sold)
- Confirmation of down payment
- Strata Form “B” (if applicable)
- Asset verification (see below)

**I’m borrowing against my current home** *(home equity lines of credit or mortgages)*

- Current mortgage balance statement (if mortgage is not with Coast Capital Savings)
- Current Property Tax Assessment
- Strata Form “B” (if applicable)
- Asset verification* (see below)
- Rental income verification (if applicable)

**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.

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