



**COMMITMENT INTENTION FORM AND DECLARATION OF WAIVER**

Revised: April, 2008

The Real Estate Act requires that you, as a prospective lender or investor of a mortgage, be provided with a completed Lender/Investor Disclosure Statement before the broker accepts any money to be used for making a mortgage loan or buying an existing mortgage. **Please complete this form and remit in confidence by fax or mail to our office.**

**Investor Details**

Contact Name(s): \_\_\_\_\_

Investor Name(s): \_\_\_\_\_  
(Name in Full to Appear on Documents, i.e. Company Name, Spouse, Joint Account Holders; Specify "and"/"or" if applicable)

Social Insurance Number/Corporation Number: \_\_\_\_\_

Social Insurance Number/Corporation Number: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Home Phone: (\_\_\_\_) \_\_\_\_\_ Home Fax: (\_\_\_\_) \_\_\_\_\_

Business Phone: (\_\_\_\_) \_\_\_\_\_ Business Fax: (\_\_\_\_) \_\_\_\_\_

E-mail: \_\_\_\_\_

**Investor Risk Tolerance (check one)**

- Low**
  - Low tolerance for risk/loss
  - Short term investment (1 year or less)
  - Minimal investment experience
- Medium**
  - Can tolerate some risk/loss
  - 1 - 2 year term
  - Moderate investment experience
- High**
  - Can tolerate risk/loss
  - 1 - 2 year term
  - Sophisticated investment experience

**Investment Details**

I/We am/are investing in the following mortgage:

File # \_\_\_\_\_ Investment Amount \$ \_\_\_\_\_

**Source of Funds**

- Personal Funds     Company Funds     Self-Directed RRSP/RRIF     Payout of File Number: \_\_\_\_\_     **Cheque Enclosed**

**Representative**

- Richard Asselin  
*Investor Representative*  
Calgary Office
- Kate Kerr  
*Licensed Associate*  
Calgary Office
- Angela Yip  
*Licensed Associate*  
Calgary Office
- Lorene O'Neill  
*Licensed Associate*  
Edmonton Office

I/We have read the Sample Lender/Investor Disclosure Statement (*on reverse*) and waive my/our right to a completed copy at this time, with the understanding that I/we will receive a completed Lender/Investor Disclosure Statement along with a reporting package confirming the purchase transaction, within 30 days of the purchase date.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

|   |  |
|---|--|
| <b>CALGARY</b><br>Gibraltar Place<br>Suite 300, 1000 - 9 Avenue S.W., Calgary, AB T2P 2Y6<br>Local Phone: (403) 270-7000 • Toll Free Phone: 1-888-878-0677<br>Local Fax: (403) 233-8115 • Toll Free Fax: 1-866-233-8115 | <b>EDMONTON</b><br>The Dorchester Building<br>Suite 410, 10357 - 109 Street, Edmonton, AB T5J 1N3<br>Local Phone: (780) 482-7031 • Toll Free Phone 1-800-482-1646<br>Local Fax: (780) 482-5917 |
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# Sample Lender/Investor Disclosure Statement

**LENDER/INVESTOR DISCLOSURE STATEMENT** **FILE #L-**

INVESTOR: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_

MORTGAGOR: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_

1. Detailed Description of Property:  
MUNICIPAL: \_\_\_\_\_  
LEGAL: \_\_\_\_\_  
PROPERTY TYPE: \_\_\_\_\_

2. Terms and Conditions of the Mortgage:  
(a) Principal amount of the 1<sup>st</sup> Mortgage to be repaid: \$ \_\_\_\_\_  
(b) Annual Percentage Interest Rate: \_\_\_\_\_ % Compounded: MONTHLY  
(c) Original amount of the Mortgage: \$ \_\_\_\_\_ Date: \_\_\_\_\_  
(d) Term: 1 Year Amortization: INTEREST ONLY  
(e) Amount of monthly payments: \$ \_\_\_\_\_  
(f) Maturity Date\*: \_\_\_\_\_  
(g) Balance at Maturity Date if all payments made: \$ \_\_\_\_\_  
(h) Amount Purchased: \$ \_\_\_\_\_ Interest Rate: \_\_\_\_\_ %  
(i) Monthly Payments: \$ \_\_\_\_\_

\*Note: It is common for a mortgage to enter into a renewal for an additional term after the maturity date. This renewal may be up to one (1) additional year in duration. Your funds will be automatically renewed into the same mortgage for the new term at the current interest rate. You will be notified in advance in writing of any changes to the mortgage term, including any payout(s) and/or renewal(s).

3. Charges and Fees (Estimate)  
Total Fees \_\_\_\_\_

4. The terms and conditions of repayment before maturity of mortgage is: OPEN

5. Appraisal Date: \_\_\_\_\_ Appraisal Firm: \_\_\_\_\_  
Appraiser: \_\_\_\_\_ Appraisal Amount: \$ \_\_\_\_\_

6. Payments on the mortgage on this property are current except for the following arrears:

7. A copy of the following were provided to the Investor:  
a) Solicitors Report    b) Registered Mortgage    c) Certificate of Title

I, \_\_\_\_\_, of Gibraltar Mortgage have fully completed the above statement form in duplicate and have provided a copy to the Investor on the \_\_\_\_\_ day of \_\_\_\_\_ A.D., in the year \_\_\_\_.

**GIBRALTAR MORTGAGE LTD.**

I/We, \_\_\_\_\_, sign this statement form in duplicate this \_\_\_\_\_ day of \_\_\_\_\_ A.D., in the year \_\_\_\_\_, and I/We hereby acknowledge receipt of the fully completed copy of this statement.

## Your Privacy and Our Use of Information

Gibraltar Mortgage Ltd. recognizes your right to confidentiality and is seriously committed to protecting the privacy of our account holders. Gibraltar Mortgage Ltd. will not share your information with any third party except as required by federal regulations or other legal statutes.

Gibraltar Mortgage Ltd. cannot offer some of its services without some form of personally identifying or corporate information collection and distribution. Consequently, Gibraltar Mortgage Ltd. does ask for the submission of some personally identifying and corporate information. We only collect and retain such information as is relevant and/or necessary to administer your investment accounts. Personal information you provide to Gibraltar Mortgage Ltd. is held in the strictest confidence.

If you have any questions or concerns regarding the collection and/or use of information you supply, please do not hesitate to contact us.