



Switching your mortgage checklist

If you're considering transferring your mortgage to Servus, so your mortgage can start paying you back, this checklist will help you gather the information you need to bring to your appointment to help make your mortgage switch quick and easy.

INFORMATION TO SWITCH

Information about your current mortgage:

- ☐ Recent mortgage statement or Renewal notification
- ☐ Is your mortgage through CMHC or Sagen?
- ☐ Homeowner insurance policy
- ☐ Property tax bill or statement

INCOME VERIFICATION

If you're employed you need:

- ☐ A letter from your employer on company letterhead that includes your name, salary or hourly pay rate, name and title of the person signing the letter
- ☐ Copy of a recent pay stub

If self-employed, commission-based or contract:

- ☐ Most recent Notice of Assessment (NOA)/Income statement
- ☐ 2 years T1 Generals/Tax Return Summary

ADDITIONAL QUESTIONS TO CONSIDER

- Does my current Financial Institution pay me back for having my mortgage with them?
- How much Profit Share could I be receiving every year with a mortgage at Servus?
- How do I feel about the service I'm getting from my current FI?
- Is my current mortgage rate competitive?
- Could I be saving money with my mortgage at Servus?