



# The Pro Funds Exchange Program Questionnaire

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## CONTACT INFORMATION

NAME:

EMAIL ADDRESS:

PHONE NUMBER:

STREET ADDRESS:

CITY, STATE:

ZIP CODE:

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## REGISTERED FUNDS

How much do you have held in the following registered accounts?

RRSP:

TFSA:

RESP:

LIRA:

OTHER:

From which account are you looking to exchange funds?

RRSP  
LIRA

TFSA  
Other

RESP

What is the total funding amount you are looking to exchange in this program? \*(This will be the same loan amount you will receive from your match)

What institution are your registered funds currently held at?

Please select what you will be using these funds for:

Purchase real estate  
Construction & renovations (flips)  
Mortgage investing  
Other: please explain below

Please describe any particulars regarding the use of funds:

Please select the duration of time you are seeking to exchange funds:

1 year                      2 years  
3 years                      4 years  
5 years                      I am flexible

Please describe how you plan to pay back your loan amount at the end of the term of the exchange:

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## PROPERTY INFORMATION

Please complete the following information per property that you currently own.

\* If you own more than 3 properties, please provide additional details on a separate page

### PROPERTY 1

Address:

Property value:

Mortgage outstanding:

Secured line of credit amount (if applicable):

Do you have an MPAC assessment or appraisal completed within the past 6 months to verify property value:

Yes  
No

### PROPERTY 2

Address:

Property value:

Mortgage outstanding:

Secured line of credit amount (if applicable):

Do you have an MPAC assessment or appraisal completed within the past 6 months to verify property value: Yes  
No

**PROPERTY 3**

Address:

Property value:

Mortgage outstanding:

Secured line of credit amount (if applicable):

Do you have an MPAC assessment or appraisal completed within the past 6 months to verify property value: Yes  
No

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**PERSONAL INFORMATION**

Please select your annual income range: <\$50,000  
\$50,000-60,000  
\$61,000-80,000  
\$81,000-100,000  
\$100,000-\$150,000  
\$151,000-\$250,000  
\$250,000 +

Please select your credit score range: <400 400-500  
501-600 601-700  
701-800 800 +  
I'm not sure

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Thank you for the completion of this application! Once your application is received, we will begin a screening process in order to find you a suitable match based on the information indicated above.

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