

Our brokerage is dedicated to ensuring that we provide you with suitable investments based on your needs and circumstances. To meet this objective and fulfill the suitability requirements as dictated by law, we require the following information. We are dedicated to the protection of our investors and this information is considered personal and confidential and will only be used to meet the objectives as provided and required by law.

Investor/Lender Information		
Lender/Investor's Name (First, Middle, Last)	Date of Birth (MMM DD, YYYY)	SIN
ID Type and Number (Attach all corporate documents when necessary) 1) ID# 2) ID#	<input type="checkbox"/> I have viewed the original <input type="checkbox"/> I have attached a clear and legible photocopy <input type="checkbox"/> I have not physically met the client and cannot conform ID	

Tel (H): _____ Cell: _____ Email: _____

Present Address: _____ Years ____ Months ____

Previous Address (if current less than 3 Years): _____ Years ____ Months ____

<p>Approximate Income</p> <input type="checkbox"/> Under \$25,000 <input type="checkbox"/> \$25,000 to \$49,999 <input type="checkbox"/> \$50,000 to \$74,999 <input type="checkbox"/> \$75,000 to \$99,999 <input type="checkbox"/> \$100,000 to \$124,999 <input type="checkbox"/> \$125,000 to \$200,000 <input type="checkbox"/> Over \$200,000	<p>Approximate Net Worth</p> <input type="checkbox"/> Under \$25,000 <input type="checkbox"/> \$25,000 to \$49,999 <input type="checkbox"/> \$50,000 to \$74,999 <input type="checkbox"/> \$75,000 to \$99,999 <input type="checkbox"/> \$100,000 to \$124,999 <input type="checkbox"/> \$125,000 to \$200,000 <input type="checkbox"/> Over \$200,000
<p>Risk Tolerance Scale</p> <input type="checkbox"/> 0 Low <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 Medium <input type="checkbox"/> 5 <input type="checkbox"/> 6 Medium High <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 High	<p>Mortgage Knowledge</p> <input type="checkbox"/> Sophisticated <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Novice
	<p>Liquidity Requirements</p> <input type="checkbox"/> 1 to 3 years <input type="checkbox"/> 3 to 5 years <input type="checkbox"/> 5 to 10 years <input type="checkbox"/> 11 to 20 years
----- Investor(s) Initials	

Do you need all of your invested money back in the next year or two?

Yes

No

Secure

Your financial stability is important when determining how much risk you can tolerate in your investments. Do you feel that your current financial situation is:

Very Secure

Relatively Secure

Secure

Somewhat Secure

Not Secure

Your age is:

under 30

30 to 42

43 to 54

55 to 64

Over 64

Which statement best describes your preferred approach to investing?

I would rather accept a lower rate of return to reduce my risk

I would like to achieve a high rate of return and am willing to accept a greater degree of risk

Certification: By signing below you certify that the information in this form is accurate and will be considered current unless we are notified otherwise. We are compliant with current PIPEDA legislation and our "Privacy Policy" can be viewed on our website at www.akalmortgages.com. Personal information will be held in the strictest of confidence and only released to third parties to fulfill our obligations to you or to comply with regulatory requirements or when required to do so by law.

Investor's Name (PRINT) _____

Signature _____

Date _____

Mortgage Agent/Broker's Name (PRINT) _____

Signature _____

Date _____

**Compliance Approval
(Head Office Use Only)**

Comments: _____

Compliance Officer's Name (PRINT) _____

Signature _____

Date _____