



Kitchener
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Kitchener, ON N2C 2S9
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f. 519-742-6072

Waterloo
103-340 Hagey Blvd.
Waterloo, ON N2L 6R6
t. 519-772-3050
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Cambridge
27 Water St. N.
Cambridge, ON N1R 3B2
t. 519-623-2211
f. 519-742-6072

Personal Loan Checklist

Member(s):
Appointment
Date/Time:

Branch Location:

We look forward to meeting with you to work towards achieving your financial goals. To make this process easier, please ensure you gather the below documents and additional information to bring to your appointment.

Income

Please bring two pieces of the following documents to confirm your current employment status and earnings:

Employed or Retired

- Two most recent paystubs and T4
- Letter of Employment on company letterhead
- Variable income (commissioned, overtime, bonused, part-time employment, investment statements, T4RIF legal agreement for support or alimony payments)
- Most recent two years T1 General and Notice of Assessment from Canada Revenue Agency
- Pensions: T4A OAS, T4A(P) CPP, T5007 WSIB and Workers Compensation
- EI – Maternity Leave (Letter from Employer with Return Date)

Self Employed or Investment Property

- Most recent two years T1 Generals (Personal & Business)
- Two years Notice of Assessment from Canada Revenue Agency
- Two years current Business Financial Statements (full package)
- Signed up to date Lease Agreements

Additional Documentation:

Personal Loan

- Statement of debts to be paid
- Copy of any Registration of Collateral (if applicable)

Please bring these documents to complete your application with an ECU Representative. If you have questions about your upcoming appointment or the required documents, please contact your nearest branch.

*This checklist is for informational purposes only.