

**FAMILY TRANSFER INFORMATION SHEET**

Met with: \_\_\_\_\_ Completion Date: \_\_\_\_\_

Contact Phone #: (home) \_\_\_\_\_ (cell) \_\_\_\_\_ (email) \_\_\_\_\_

Property: Civic: \_\_\_\_\_

Legal: \_\_\_\_\_

Name of current registered owner(s): 1) _____ 2) _____
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To be registered in the name(s) of:

1) _____ Occupation: _____ Address for title: _____ Citizenship: _____ First time home buyer: Yes ___ No ___ Phone #: (home) _____ (cell) _____ (email) _____ Social Insurance Number: _____ 2) _____ Occupation: _____ Address for title: _____ Citizenship: _____ First time home buyer: Yes ___ No ___ Phone#: (home) _____ (cell) _____ (email) _____ Social Insurance Number: _____
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Reason for transfer: \_\_\_\_\_

Interest being transferred \_\_\_\_\_% Joint Tenants: Yes \_\_\_ No \_\_\_

Other: \_\_\_\_\_

Relationship: \_\_\_\_\_ If married or common-law, how long? \_\_\_\_\_

Who lives on the property? \_\_\_\_\_ For how long? \_\_\_\_\_

Is the Transfer PPT exempt? Yes \_\_\_ No \_\_\_ Comments \_\_\_\_\_

Is GST Applicable? (Vacant Land) Yes \_\_\_ No \_\_\_

Fair market value of the property: \$ \_\_\_\_\_

Is independent legal advice required? Yes \_\_\_ No \_\_\_

Have the clients dealt with the bank regarding the mortgage on title? Yes \_\_\_ No \_\_\_

Advise clients to deal with fire insurance/liability insurance. Done \_\_\_\_\_ (initial)

Is there a Tax Deferment on title? Yes \_\_\_ No \_\_\_

(must be paid out or sign Application and Amending Agreement, then get consent letter)

Tax Deferment Agreement Number: \_\_\_\_\_

Name of Strata Management company: \_\_\_\_\_

Are there any current special levies due or on a payment plan? Yes \_\_\_ No \_\_\_

Additional Information: \_\_\_\_\_

<b>OFFICE USE:</b>		
Documents required: - Independent legal advice required	Yes ___	No ___
- Deed of Gift	Yes ___	No ___
- Statutory Declaration – Relinquish of Equity	Yes ___	No ___
- Consent Transfer to Spouse – Separation	Yes ___	No ___