



LUMP SUM MORTGAGE PAYMENT REQUEST

MORTGAGE INFORMATION

Mortgage Account Number: _____

Name: _____
First Name Middle Initial Last Name

Lump Sum Payment Amount: _____

Method of Payment: Existing Electronic Funds Transfer (EFT) Bank Draft/Money Order Personal Cheque

Date of Withdrawal (if applicable): _____

Do you anticipate making future lump sum payments? Yes No If yes, how often: Annually Quarterly Monthly Unsure

SOURCE OF FUNDS DECLARATION (Government regulations require Bridgewater Bank to determine source of funds)

I declare the funds for the above transaction were obtained by me, the Payor, from the following source(s):

<input type="checkbox"/> Employment Income	<input type="checkbox"/> Retirement/Pension Income	<input type="checkbox"/> Grants/Scholarship
<input type="checkbox"/> Insurance Claim Payments	<input type="checkbox"/> Corporate Funds	<input type="checkbox"/> Investment Income/Savings
<input type="checkbox"/> Trust/Inheritance	<input type="checkbox"/> Gift	<input type="checkbox"/> Loan
<input type="checkbox"/> Proceeds from a Legal Case or Action	<input type="checkbox"/> Lottery Winnings	<input type="checkbox"/> Sale of Property
<input type="checkbox"/> Other (please specify):		

Provide details here (details of employment income, details of pension, name of institution providing grant or scholarship, name and relationship of person making gift, etc.).

CUSTOMER EMPLOYMENT INFORMATION (To ensure we have your current employment information on file, please complete the following section.)

Occupation: _____ Work Phone: _____

Employer Name: _____ Cell Phone: _____

Address: _____ Email: _____

Customer Signature

Date

Please print, sign and send the completed document back to us by one of the following methods:

- Scan and email to customer.experience@bridgewaterbank.ca
- Fax to 1.866.841.3537
- Mail to Bridgewater Bank, Suite 150, 926 – 5th Ave SW, Calgary, Alberta T2P 0N7

If you have any questions or wish to obtain further information regarding this agreement, please contact us toll free at 1.866.243.4301 or email us at customer.experience@bridgewaterbank.ca.