

# Broker/Agent Change Form

To be completed by the Broker/Agent facilitating mortgage transaction

Ensure you complete appropriate sections		
Submission Agent that is now a Co-Agent with a new brokerage, please complete Sections: A, D		
Submission Agent will now be a Co-Agent yet remains with same Brokerage, please complete Section: D		
Submission Agent that has moved to new Brokerages, please complete Sections: A - <i>If registered co-agents moving to new brokerage, please complete and provide Form 1 with Change form</i>	Co-Agent that has changed both Submission Agent and Brokerages, please complete Sections: A & C	
Co-Agent that is now a Submission Agent with new brokerage, please complete Sections: A & B	Co-Agent that is now a Submission Agent with same brokerage, please complete Section: B	
Co-Agent that has changed Submission Agent yet remains with same Brokerage, please complete Sections: C		
REQUIRED: Mortgage Broker/Agent Information (Name(s) must be exactly as they appear on licensed registration)		
Name of Broker/Agent:		
Broker/Agent License number:		
Effective Date of Change:		
Submission Type: <input type="checkbox"/> Submission Agent <input type="checkbox"/> Co-Agent <input type="checkbox"/> Assistant		
Business Street Address:		
City:	Province:	Postal Code:
Phone (work/cell):	Fax:	
I would like email notifications related to Deal status and Broker Portal alerts sent to:		
Email address associated with Electronic Delivery System:		
If different from above, I would like personal email messages for me (Event invitations, rate changes, product announcements, etc) sent to:		
Social Media Platforms: Facebook:	LinkedIn:	Twitter: @
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Unspecified		
Section A: New Brokerage		
Name of New Brokerage:		
Electronic Delivery System (i.e. FINASTRA   Velocity):		
Brokerage Firm Code:		
Broker/Agent Expert Profile No.:		
Email address associated with Electronic Delivery System:		
Previous Brokerage Name:		
I confirm that I have moved my license to the New Brokerage above. All finder's fees earned by myself effective with the date of this change form are payable to the New Brokerage.		
Section B: Co-Agent Promotion to Submission Agent		
Indicate if you are now a: <input type="checkbox"/> Pooler <input type="checkbox"/> Individual		
Where applicable, please have pooling Co-Agents and/or licensed Assistants complete forms: New Broker/Agent Registration or Broker/Agent Change Form.		
Name of Principal Broker/Broker of Record:		
In signing this agreement, each Submission Agent will originate a minimum of 12 funded mortgages per year or such other expectation as communicated from the Lender to the Principal Broker/Broker of Record/Brokerage. Allowable Pooling team size of co-agents cannot exceed 25 active broker/agents. Each active co-agent must fund 1 deal per calendar year. We reserve the right not to renew registration in the following year if the expectation has not been met.		

January 28, 2019

MCAP Service Corporation  
Ontario Mortgage Brokerage #10515  
Ontario Mortgage Administrator #11692

MCAP Financial Corporation  
Ontario Mortgage Brokerage #10600  
Ontario Mortgage Administrator #11790

200 King Street West  
Suite 400  
Toronto, ON M5H 3T4  
Tel 416 598 2665

1 800 387 4405

**Section C: Co-Agent/ Assistant Moves to Different Submission Agent**

Submission Agent Name:

Previous Submission Agent Name:

In signing this agreement, each Co-Agent will originate a minimum of 1 funded mortgage per year or such other expectation as communicated from the Lender to the Submission Agent/Principal Broker/Broker of Record/Brokerage. We reserve the right not to renew registration in the following year if the expectation has not been met.

**Section D: Current Submission Agent Changing to a Co-Agent**

Submission Agent Name:

In signing this agreement, each Co-Agent will originate a minimum of 1 funded mortgage per year or such other expectation as communicated from the Lender to the Submission Agent/Principal Broker/Broker of Record/Brokerage. We reserve the right not to renew registration in the following year if the expectation has not been met.

**Broker Portal Access | Broker Portal Terms and Conditions of Use**

I agree to abide by the terms and conditions listed below:

Yes       No

Mobile Phone:

By acknowledging our Broker registration you agree to receive your Broker Portal login by text as listed above in the "Mobile Phone". Please note messages or data rates may apply.

**TERMS AND CONDITIONS**

Your access to and continued use of this extranet site constitute your acceptance of and compliance with the following provisions. The contents of this extranet site are confidential and proprietary information of us and our affiliates and their licensors. You agree you will not share the contents of this extranet site. Each person that uses the system should be an authorized user and must be assigned a personal, unique user account. You shall not give out user identifiers to departments, guests, or any groups or categories of persons. You may obtain additional Authorized Users Licenses. We reserve the right to terminate an authorized user's or an Authorized Licensee's access privileges at any time, for any or no reason, in our sole discretion without notice.

**Broker/Agent Acknowledgement**

We require you to be licensed under the provincial regulations for all provinces you are conducting business in. In addition, the Québec Regulator, Organisme d'autoréglementation du courtage immobilier du Québec (OACIQ) requires brokers/agents to be licenced in the province of Québec for residential mortgage brokering for properties located in Québec. Brokers who are currently licensed in other provinces can submit deals on properties in Québec as long as they are licensed by OACIQ, or must co-broker with a licensed Québec broker submitting the deal. You acknowledge that if you breach this condition, you will be liable for non-compliance under Québec regulations and any liability in accordance with Québec license regulation.

Upon electronic submission of this agreement, I agree to be bound by the terms and conditions of the program.

Name of Broker/Agent (please print):

Signature of Broker/Agent:

Date: