

1, 2, 3 Step Process – Paper Base Application

Reminder 2018-2019 RRSP Campaign

Campaign Dates: November 1st, 2018 to March 1st, 2019

Future Funding Dates

- > Future funding option available from November 1st, 2018 to March 1st, 2019
- > Cut-off date to submit your RRSP application requesting a disbursement at a future date: February 22nd, 2019
- > Offered only with variable rate loans

Simplified Process

- > RRSP loan amount between \$1,000 and \$25,000; **and**
- > maximum term 24 months; **and**
- > all questions in the “Additional Information Regarding the Applicants” section on the RRSP Loan Credit Application must be answered “No”.

Advisor’s Role

Step 1 – Complete the RRSP Credit Application with Applicants

1. Complete the RRSP Credit Application
2. Complete the Cost of borrowing disclosure statement
3. Verify the authenticity one piece of ID with government-issued photo or two pieces of ID (original and valid)
4. Obtain Applicants’ signature on the RRSP Credit Application
5. Sign the Credit Application as a Witness
6. Provide the applicants with a copy of the Credit Application and the Cost of borrowing disclosure statement

Step 2 – Required documentation

You will find below the requested documentation in order to submit a Credit Application to the bank. For further information, please see the Advisor Guide.

Type 1 – Simplified Process

1. RRSP Credit Application
2. Personalized void cheque

Type 2 – Regular Process

1. RRSP Credit Application
2. Personalized void cheque
3. Balance sheet (Page 2 of the Credit Application)
4. Proofs of incomes and assets

Step 3 – Submit your file by fax

1. Fax all the required documents to the Bank at: **1 888 307-2997**
2. Send all originals (after receiving the credit decision and the confirmation that the documents are conform) to the following address:

**National Bank (transit 1000-1)
500 Place d’Armes, 22nd Floor, Montreal, Quebec H2Y 2W3**

Bank’s Role

- > Verify the conformity of documents and proceed with the credit evaluation
- > Communicate the credit decision to the advisor
- > Disburse the loan and transfer the funds to the Partner’s trust account
- > Send a daily funding report to Partner’s Head Office