



## Purchase Instruction Sheet – Québec<sup>1</sup>

Insurance Representative, Dale Parizeau Morris Mackenzie Inc. (“Dale Parizeau Morris Mackenzie”): 1-877-865-6865

|   | Completed                |
|---|--------------------------|
| <p><b>1. Confirm that:</b></p> <ul style="list-style-type: none"> <li>• neither you nor anyone at your firm is mortgage broker for mortgage;</li> <li>• purchasing right of ownership in residential property (four-plex or smaller);<br/><b>Note:</b> commercial, leasehold, farm, time share, and co-operative properties not eligible; for OwnerEXPRESS® policy, see OwnerEXPRESS Instruction Sheet.</li> <li>• purchase price is \$2 million Cdn or less – <b>CAUTION: for deals over \$1 million, call the TitlePLUS Customer Service Centre at 1-800-410-1013 immediately for special requirements;</b> and</li> <li>• certificate of location coverage will typically be available. For details, see “TitlePLUS Quick Facts” chart.</li> </ul> | <input type="checkbox"/> |
| <p><b>2. Send retainer letter</b> to client, enclosing sample TitlePLUS policy. Include wording in letter confirming client’s consent to release of personal information to comply with applicable privacy legislation.<sup>2</sup></p>   | <input type="checkbox"/> |
| <p><b>3. Obtain and review title search</b> (including deleted documents, if any) and conduct letter searches. For details of required searches, see “TitlePLUS Quick Facts” chart.</p> <ul style="list-style-type: none"> <li>• If search reveals <b>any transfers or mortgage discharges within the past six months</b>, add details to TitlePLUS Purchase Policy – Québec Order Form (“Order Form”) or call the TitlePLUS Customer Service Centre.</li> <li>• <b>Judgments</b> found on title will be exceptions to policy coverage unless TitlePLUS Department approves otherwise or notary/lawyer handles payout and removal of the judgment from title.</li> </ul>  | <input type="checkbox"/> |
| <p><b>4. Complete Order Form</b>, including details regarding:</p> <ul style="list-style-type: none"> <li>(a) servitudes in favour of and against the property;</li> <li>(b) new and/or assumed mortgages;</li> <li>(c) judgments against vendor;</li> <li>(d) legal hypothecs, priorities and real rights; and</li> <li>(e) other particulars required in the Order Form.</li> </ul>   | <input type="checkbox"/> |
| <p><b>5. Submit Order Form</b> to Dale Parizeau Morris Mackenzie for approval before closing. When you receive notice of approval, you will receive TitlePLUS documents.</p>  | <input type="checkbox"/> |
| <p><b>6. Prepare closing documents.</b> For divided co-ownership, ensure parking/locker/other units or exclusive use areas are conveyed/created, as per Promise to Purchase.</p>  | <input type="checkbox"/> |
| <p><b>7. Receive mortgage instructions</b> and prepare mortgage documents. Confirm that lender will accept TitlePLUS coverage (check Confirmed Lenders Chart<sup>3</sup> or contact lender).</p>  | <input type="checkbox"/> |
| <p><b>8. Send Confirmation to Mortgage Lender</b> (if required by lender) and obtain sign-off on any exceptions that are not “pre-approved” by lender for TitlePLUS purposes. For more information, please see Confirmed Lenders Chart.</p>   | <input type="checkbox"/> |
| <p><b>9. Meet with purchaser(s)</b> and have them sign TitlePLUS Acknowledgment and Direction and mortgage documents. Get <b>photo identification</b>. If not divided co-ownership, review certificate of location (if any) with purchaser(s). Advise TitlePLUS Department immediately if any problems noted.</p>   | <input type="checkbox"/> |
| <p><b>10. Closing:</b></p> <ul style="list-style-type: none"> <li>(a) You are responsible for handling and exchange of all requisite closing documents and funds.</li> <li>(b) You <b>must</b>: <ul style="list-style-type: none"> <li>i. sub-search title;</li> <li>ii. register documents; and</li> <li>iii. obtain keys and deliver to purchaser(s).</li> </ul> </li> </ul>  | <input type="checkbox"/> |

(continued...)

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|--|--------------------------|
| <b>11. Notify all utilities and municipality</b> of change of ownership, as required.  | <input type="checkbox"/> |
| <b>12. Complete and sign Certificate of Title/Request to Issue Policy</b> and send to TitlePLUS Department. Issued policy and invoice will be sent to you.                       | <input type="checkbox"/> |
| <b>13. Send Final Reports</b> to purchaser and lender, enclosing policy to purchaser and following lender's instructions (see Confirmed Lenders Chart or lender's instructions). | <input type="checkbox"/> |

<sup>1</sup> The TitlePLUS policy is underwritten by Assurance LAWPRO.<sup>®4</sup>

<sup>2</sup> Please include wording in your retainer letter confirming the client's consent to the release of personal information to comply with the applicable privacy legislation. For example, you may wish to include the following:

*In order to protect your interests through TitlePLUS coverage, we require your consent to disclose to Assurance LAWPRO all necessary personal information required for purposes of applying for a TitlePLUS policy and to consent on your behalf to the collection, use and disclosure by Assurance LAWPRO of such personal information.*

<sup>3</sup> Consult [http://www.titreplus.ca/Lawyers/Confirmed\\_Lenders.asp](http://www.titreplus.ca/Lawyers/Confirmed_Lenders.asp) for Confirmed Lenders Chart.

<sup>4</sup> Assurance LAWPRO is a registered name used in Québec by Lawyers' Professional Indemnity Company.

(April 7, 2009)