

SECTION 2 – CPMB PRE-REQUISITES

- If you are registered as a Mortgage Broker**, attach a copy of your Certificate of Registration for the current year to this application
- If you are not registered as a Mortgage Broker**, attach a Certificate of Completion or a transcript of marks for Ontario's mortgage broker's education program
- Evidence of continuous activity as a Mortgage Broker or Authorized Agent of a Mortgage Broker during the past 5 years (ie. Letters from current or former employers, copies of FSCO Notification Form for Authorized Agents)
- A resume is not acceptable as evidence of employment or mortgage brokerage activity

Yes No I have been registered as a Mortgage Broker during the past 5 Years. My Broker Registration number is: _____

Yes No I have successfully completed Ontario's Mortgage Broker Educational Program. (Attach evidence)
NB. This requirement is only applicable to individuals who have achieved the educational qualifications to be registered as a Mortgage Broker, however have elected to not register as a Mortgage Broker with the Financial Services Commission of Ontario.

Yes No I am a Member of the Independent Mortgage Brokers Association of Ontario (IMBA) in good standing.

Yes No Are you currently the subject of an investigation for professional misconduct?

Yes No Have you ever been found guilty of professional misconduct? If your answer is yes, provide details.

SECTION 3 – WORK EXPERIENCE

List all relevant work experience and attach the corresponding evidence. If you are not a registered Broker, please provide letters from employer/broker or FSCO Notification Form for Authorized Agent.

Work Experience	Points per Year	Min.	Max.
Mortgage Broker	10	50	100
Mortgage Agent	5	0	50
Related Fields*	3	0	24

*Related fields include: Real Estate Broker, Real Estate Salesperson, Appraiser, Lending official for financial institutions, Lawyer, Accountant

Experience	Period		Company Name, Position	Location	Points
	From MM/DD/YY	To MM/DD/YY			
Qualified or Registered Mortgage Broker 10 points/year Min. 50 points Max. 100 points	/ /	/ /			
Mortgage Agent 5 points/year Max. 50 points	/ /	/ /			
	/ /	/ /			
	/ /	/ /			
	/ /	/ /			
Related Fields 3 points/year Max. 24 points	/ /	/ /			
Section 3 - Total Points					

Section 4 – EDUCATION

List all activities with dates and attach photocopies of educational diplomas or degrees from accredited academic institutions
OR
official transcripts of completed credit hours

- A) Formal training from a recognized Canadian or international University, College or a training college.
N.B. The Certification Committee will evaluate all degrees and diplomas.**

Level Of Education	Points Earned
Graduate Degree	10
Undergrad Degree	5
3 Yr. College Diploma	5
Certificate of Completion	1/year

Level of Education	School/Institution	Date Received	Points
Level of Education	School/Institution	Date Received	Points
Level of Education	School/Institution	Date Received	Points

Post Secondary Education Points _____

- B) Related Industry Designations**

List the designations you have achieved and attach the certificate.

10 Points

AACI – Appraisal Institute of Canada
CCIM – CCIM Institute
CRF - Real Estate Institute of Canada
FICB – Institute of Canadian Bankers
FRI – Real Estate Institute of Canada

5 Points

AICB – Institute of Canadian Bankers
AMP – Canadian Institute of Mortgage
Brokers and Lenders
CRA – Appraisal Institute of Canada
CRU - Real Estate Institute of Canada

*These designations are trademarks of their respective organizations.

Designation	Date Received	Points
Designation	Date Received	Points
Designation	Date Received	Points

Related Industry Designation Points _____

Section 4 – EDUCATION (continued)

C) Participation in educational workshops, seminars, conferences and symposiums

List dates, locations, topics of workshops and the hours attended. You may include workshops that you have attended within the past three years. Attach a separate sheet if necessary. **N.B. Please refer to the CE Points Table in the Information Brochure for applicable point values.**

Points: 1 point per hour Maximum: 50 points

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Date	Location	Topic	Education Provider	Hours Attended / Points
------	----------	-------	--------------------	-------------------------

Total Hours / Points_____

Section 4 - Total Points_____

Section 5 – INDUSTRY PARTICIPATION

List all activities with dates and attach photocopies of all documents

Participation in industry organizations (ie. Committee Member, Director)

List the organization that you have served and the years of service.

Points: 5 points per year Maximum: 25 Points

Date	Organization	Board/Committee	Years Served	Points
------	--------------	-----------------	--------------	--------

Date	Organization	Board/Committee	Years Served	Points
------	--------------	-----------------	--------------	--------

Date	Organization	Board/Committee	Years Served	Points
------	--------------	-----------------	--------------	--------

Total Participation Points _____

Instructor for industry-related organizations (ie. IMBA, OREA, REIC, ICB, etc.) – 1 point for every 10 hours that you taught

List the date, location, course name and the amount of hours that you taught. Only courses that you have taught during the past 5 years are eligible. Attach a separate sheet if necessary.

Points: 1 for every 10 hours that you taught

Maximum: 50 Points

Date	Location	Course	Education Provider	Hours Taught	Points
------	----------	--------	--------------------	--------------	--------

Date	Location	Course	Education Provider	Hours Taught	Points
------	----------	--------	--------------------	--------------	--------

Date	Location	Course	Education Provider	Hours Taught	Points
------	----------	--------	--------------------	--------------	--------

Total Instructor Points _____

Section 5 Total Points _____

Section 6 - REFERENCES

Provide 3 letters of reference (i.e. lawyers, mortgage brokers registered with FSCO, senior management of lending institutions).

TOTAL SCORE

Section 3 Points _____ Section 4 Points _____ Section 5 Points _____

Total Points _____

DECLARATION

I declare that, to the best of my knowledge and belief, the information and documents that I am providing with respect to my application for certification as a Certified Professional Mortgage Broker (CPMB) are true and correct. I acknowledge that the statements made herein are being relied upon by the Independent Mortgage Brokers Association of Ontario (IMBA), in its sole discretion, to approve my application.

I agree to abide by IMBA's Code of Conduct and By-laws.

I hereby authorize IMBA to make all inquiries necessary to verify the accuracy of the statements made herein and the information attached hereto. I acknowledge that all information collected and retained is done so in accordance with IMBA's Privacy Policy, which I have been given the opportunity to review at www.IMBA.ca.

Signature

Date

APPLICATION CHECKLIST

- I have attached only one of:
 - a Certificate of Registration under the Mortgage Brokers Act
 - a Certificate of Completion for Ontario's mortgage broker's education program
 - a transcript of marks for Ontario's mortgage broker's education program
- I have attached evidence of work experience (A resume is not acceptable)
 - Letters from current or former employers
 - FSCO Notification Form for Authorized Agents
- I have attached 3 letters of reference from industry-related individuals
- I have attached copies of all relevant certificates, diplomas or degrees
- I have signed the declaration
- I have a minimum of 125 points on my application form
- I have enclosed payment by cheque or credit card for the application fee for the sum of **\$212.00**, which includes GST (N.B. NSF Cheques are subject to an administrative charge of \$35.00)

Please check payment method	<input type="checkbox"/> Cheque	<input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard
Card Number			
Expiry Date (MM/YYYY)			
First Name on Card	Last Name on Card		
If paying by Credit Card, Billing Address is mandatory	Address:		
	City:	Postal Code:	