

personal lending document checklist

home energy loan program

Vancity is committed to ECONomics – supporting a healthy economy, healthy community, and healthy planet. That’s why Vancity, in cooperation with the City of Vancouver, has developed the Home Energy Loan Program. It provides end-to-end service and access to affordable financing to assist you in undertaking select energy-efficiency upgrades to your home.

applying for finance

Applying for the loan is easy. You can initiate the loan application process:

- online at vancity.com/Loans/homeenergy
- over the phone at 604.648.5195 or toll free 866.648.5195
- in person at any Vancity community branch (call or check out vancity.com for the branch most convenient for you)

next steps

We’ll get back to you within 3 days with the decision. If you’re approved, we’ll set up an appointment so that you can sign the necessary documentation for funding. There are a few things that you’ll need to provide in person; please bring them along to your appointment so we can get you set up quickly.

1 home energy loan program participation agreement

This document was completed with the assistance of your Energy Auditor.



2 income and employment verification

If you are a salaried employee

Please bring in any 2 of the following documents:

- T1 General for the most recent taxation year (first four pages) **or** Canada Revenue Agency Notice of Assessment (all pages)
- Employment letter on company letterhead stating employment position, signed
- Most recent pay stub with year-to-date income

If you are self-employed

Please provide all of the following documents:

- T1 General for the most recent two taxation years, including statement of business activities
- Canada Revenue Agency Notice of Assessment - most recent two years
- Financial statements - most recent three years if you own a Corporation or Limited Business

And please bring all the following documents that apply to you

Retirement, pension or disability income

- Recent investment portfolio statement (personal)
- CPP or T4A
- RSP statement - most recent
- RIF statement - most recent
- Source of pension income
- T1 General (if not salaried or self-employed)

Other income - dividend, capital gains, rental, bonus

- Statement of rental income
- Schedule 4 - Statement of investment income
- Canada Revenue Agency Notice of Assessment - most recent two years

If you have any questions, or you’d like more information about the Home Energy Loan Program loan or advice on other Vancity loans to help you make energy-efficiency upgrades to your home, please visit vancity.com/Loans/homeenergy or call 604.877.7000, 604.648.5195 or toll-free 1.888.648.5195.

