

Bring these six items to your free consultation. With them ready, your loan file arrives complete and the lender does not pause to request documents during underwriting.



Year-end compilation

The core lender document. Have a CSRS 4200 compilation ready at application, not spreadsheets.

1



Two years of statements

Lenders read direction, not one snapshot. Include prior-year comparatives for the trend.

2



12 months bank statements

Download every account so cash reconciles and supports the figures.

3



Recent T2 filed

File your most recent corporate return before applying so it shows tax compliance.

4



Reconciled bookkeeping

Close the books first so the statements tie out and hold up under lender questions.

5



Forecast if requested

Some lenders ask for a projection. Prepare it separately from the year-end compilation.

6

Pro Tip

Start the compilation before you submit the application, not after the lender asks. A finished report in hand at application keeps the financials off the critical path.

What happens next

1 Book a free call

We confirm what your lender requires and scope the work.

2 Share the six items

Upload the checklist items through our secure portal.

3 We compile and deliver

You receive lender-ready statements in time to apply.