



2200, 125 – 9th Ave. S.E., Calgary, AB T26 0P6  
Telephone: 1(877) 565-0001 Fax: (403) 261-7523

**SOLICITOR’S CERTIFICATE OF DISCLOSURE &  
UNDERTAKING REGARDING ARMS-LENGTH  
MORTGAGES**

I, \_\_\_\_\_, of the firm \_\_\_\_\_, practicing in the  
City of \_\_\_\_\_, Province of \_\_\_\_\_, acknowledge that my services have been retained by:

- the mortgagor, namely \_\_\_\_\_ and
  - I have disclosed to the lender/investor that I do not represent him/her and cannot protect his/her interests in connection with this transaction and
  - I have advised the lender/investor to seek independent legal advice, in accordance with the Rules of Professional Conduct of the Law Society of this province;
- the lender/investor, namely \_\_\_\_\_
- both the mortgagor and the lender/investor named above

to prepare and register a \_\_\_\_\_ mortgage on the following property: \_\_\_\_\_  
in favour of Olympia Trust Company, as Trustee for RRSP/RRIF # \_\_\_\_\_.

I have no interest, direct or indirect, in the mortgage or the property.

I understand that Olympia Trust Company (“Olympia”), will upon receipt of a duly executed *Mortgage Direction and Undertaking* from the lender/investor, advance funds to me, in trust, from the lender/investor’s Self-Directed Plan.

I undertake to hold these funds in escrow until registration on the appropriate Land Title Register of a valid and enforceable \_\_\_\_\_ mortgage on the property described above.

I further undertake to provide Olympia with a copy of the mortgage, duly registered, within 30 days of the advance of the funds to the mortgagor.

I acknowledge that this *Certificate of Disclosure and Undertaking* is a requirement of Olympia intended for the sole use and benefit of the lender/investor and further declare that I am not acting for Olympia, that I am not taking instructions from Olympia and that Olympia has no obligation towards me or the mortgagor in connection with this transaction.

If the transaction contemplated is not completed, I undertake to return the funds to Olympia, for deposit in the lender/investor Self-Directed Plan.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
Solicitor’s Signature

.....  
I have read the foregoing and I am satisfied with its content. I understand that this certificate is required by Olympia for my benefit only and that Olympia makes no representation as to the veracity and/or accuracy of its content nor has any obligation to make any verification or investigation in this regard.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
Annuitant or Holder Signature

\_\_\_\_\_  
Witness Annuitant or Holder (Printed)

**THE ABOVE, SOLICITOR’S CERTIFICATE OF DISCLOSURE & UNDERTAKING HAS NOT BEEN COMPLETED AS NO LAWYER IS WORKING ON MY BEHALF.**

\_\_\_\_\_  
Annuitant or Holder Signature