



# SAGEN™

## ENERGY-EFFICIENT HOUSING PROGRAM REFUND APPLICATION

As a Sagen-insured mortgage holder purchasing an energy-efficient home or renovating to improve energy efficiency, you are eligible to receive a partial premium refund of up to 25%.

### How to Get Your Refund

---

To qualify for a premium refund, you must meet the eligibility requirements below:

- Sagen must receive all mortgage insurance premiums and fees prior to issuing the partial premium refund
- Home must meet all minimum energy efficient program requirements based on your date of application for mortgage insurance
- The date of the premium refund application cannot be greater than 24 months from the closing date of the mortgage
- All supporting energy efficient documentation cannot be greater than 5 years old

### Documentation Requirements to Accompany Application Form:

---

- Purchasing a new or existing home:
  - Documentation certifying your home was built under a Sagen qualifying energy efficient building program OR
  - A copy of the first page of your EnerGuide performance evaluation report displaying the rating of the home.
- For high-rise condominiums units:
  - A copy of the building's LEED Certificate OR
  - Documentation signed by NRCan, the project engineer or builder that the entire condo building is greater than or equal to the minimum program requirements.





Renovating an existing home (Purchase Plus Improvements):

- A copy of the first page pre-improvement and first page post-improvement EnerGuide performance evaluation report prepared by an NRCan qualified energy advisor.

If the above criteria are met, Sagen will provide a partial premium refund based on the requirements at the time of application for mortgage insurance.

## Please complete the application below:

---

Sagen Mortgage Insurance Application Reference Number

(Please refer to your mortgage documentation or contact your mortgage bank to obtain the Sagen Reference Number)

## Property address for which the refund is being requested

Street	City	Province	Postal Code
Telephone # day (Area Code)	Telephone # day (Area Code)		

If mailing address is same as above, please check box Mailing address

Street	City	Province	Postal Code
Telephone # day (Area Code)	Telephone # day (Area Code)		

## Primary Contact Information

First Name	Initial	Last Name	
Telephone # day (Area Code)	Telephone # evening (Area Code)	Email Address	

All borrowers listed on the mortgage loan application must be named on this application for premium refund. Each applicant must also consent to the processing of the partial premium refund and certify that all information and documentation provided is true and complete to the best of their knowledge.





## Borrower Contact Information

1) First Name	Initial	Last Name
Signature		Date YYYY/MM/DD
2) First Name	Initial	Last Name
Signature		Date YYYY/MM/DD
3) First Name	Initial	Last Name
Signature		Date YYYY/MM/DD
4) First Name	Initial	Last Name
Signature		Date YYYY/MM/DD
5) First Name	Initial	Last Name
Signature		Date YYYY/MM/DD

Submit by mailing or faxing your completed application, along with your Energy-Efficiency documentation as outlined below to:

Sagen  
2060 Winston Park Drive, Suite 300,  
Oakville, ON L6H 5R7  
Attention: Finance Department – Energy Efficient Group

Refunds are processed and mailed within 30 business days of receipt of application. Information collected on this form is used for the purpose of issuing a refund with regard to your purchase or renovation of an energy-efficient home, in compliance with applicable law. Should you have any questions regarding the use of your personal information call toll free at 1 800 511 8888.

---

For questions regarding our Energy-Efficient Housing Program, call toll free at 1 800 511. 8888; Quebec residents, call toll free at 1 877 470 4144.

