



Filogix Mortgage Technology Corp.

Filogix Expert Release Notes

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Overview

The Oct 2026 Expert Broker release includes various enhancements and maintenance fixes including:

- New British Columbia Forms

Special Note: Everyone using Filogix Expert MUST clear your browser cache after the release. Instructions for clearing your browser cache are available from the Expert sign-on page and by accessing the provider's support sites using the links below:

Internet Explorer:

<https://support.microsoft.com/en-ca/help/260897/how-to-delete-the-contents-of-the-temporary-internet-files-folder>

Firefox :

<https://support.mozilla.org/en-US/kb/how-clear-firefox-cache>

Chrome :

https://support.google.com/chrome/answer/2392709?hl=en&ref_topic=7438008&co=GENIE.Platform%3DDesktop&oco=1

British Columbia Mortgage Services Act Forms

Effective October 13, 2026, British Columbia's new Mortgage Services Act (MSA) will replace the Mortgage Brokers Act and introduce a new regulatory framework for mortgage services in the province. The new framework strengthens disclosure requirements and introduces standardized forms intended to provide borrowers and lenders with clear information about broker representation, remuneration, mortgage suitability and risks, and potential conflicts of interest.

New BC Forms

Under the new MSA framework, mortgage brokers have specific disclosure obligations intended to give borrowers and lenders clear information at appropriate points in the mortgage process so they can make informed decisions.

In advance of these regulatory changes taking effect, new BCFSA Mortgage Services Act forms have been added to Expert Broker to support brokers in meeting the new requirements. The existing BC forms currently available in Expert Broker will remain available and are not being replaced as part of this update.

Edit screens, accessible through the Edit button, have also been added for each of these forms, allowing users to enter information that will populate the resulting PDF.

Forms			
Select All Clear All English Print Documents Cancel			
Deal	Consent Form	Select ☐	Print
Risk and Due Diligence	Politically Exposed Person Declaration - Jack Birch	Select ☐	Print Edit
First Mortgage	Mortgage Intelligence Insurance Consent	Select ☐	Print
	Mortgage Application	Select ☐	Print
	Mortgage Summary	Select ☐	Print
	Form 1A - Disclosure of Representation to Borrower	Select ☐	Print Edit
	Form 2A - Disclosure of Risks to Unrepresented Borrower	Select ☐	Print Edit
	Form 3A - Disclosure of Interests to Borrower	Select ☐	Print Edit
	Form 4 - Disclosure to Borrower of Expected Remuneration	Select ☐	Print Edit
	Form 6A - Disclosure of Suitability and Material Risks to Borrower	Select ☐	Print Edit
	Form 7 - Disclosure to Client of Remuneration	Select ☐	Print Edit
	Form 8 - Disclosure of the Risks of Dual Agency	Select ☐	Print Edit
	Form 9 - Agreement Regarding Conflict of Interest Between Clients	Select ☐	Print Edit
	BC - Lender Disclosure Statement	Select ☐	Print Edit

Form 1A - Disclosure of Representation to Borrower

Confirms whether the mortgage broker represents the borrower and helps ensure the borrower understands the broker's role before mortgage services are provided.

Form 2A - Disclosure of Risks to Unrepresented Borrower

Explains the broker's role and the risks to a borrower who is not being represented by the broker.

Form 3A - Disclosure of Interests to Borrower

Discloses direct or indirect interests that the mortgage broker, brokerage, or their associates or related parties have or may acquire in the mortgage transaction, helping the borrower understand potential conflicts of interest.

Form 4 - Disclosure to Borrower of Expected Remuneration

Provides borrowers with information about the remuneration the mortgage brokerage expects to receive if the borrower proceeds with a presented mortgage option.

Form 6A - Disclosure of Suitability and Material Risks to Borrower

Provides information about why a mortgage is considered suitable for the borrower's needs and circumstances and identifies material risks associated with the mortgage.

Form 7 - Disclosure to Client of Remuneration

Provides clients with disclosure about remuneration the mortgage brokerage receives or expects to receive from someone other than the client.

Form 8 - Disclosure of the Risks of Dual Agency

Explains the risks associated with dual agency when a mortgage broker is acting for more than one client in the same transaction.

Form 9 - Agreement Regarding Conflict of Interest Between Clients

Documents a conflict of interest between clients, the available options for proceeding, and the course of action agreed to by the clients.

For tracking and record-keeping purposes, each use of the Print option is recorded in History, allowing users to identify which form was accessed and when.

History ?					
			 Transaction History		
Page 1 of 8		 Next		Results 1-25 of 189	
Date	Type	User ID	Status	Description	
October 01, 2026 04:08 PM EST	Interface	Ng, Margaret	In Progress	Form print - Disclosure - Disclosure to Borrower of Expected Remuneration request for Mortgage ID=418013	
October 01, 2026 04:08 PM EST	Interface	Ng, Margaret	In Progress	Form print - Disclosure - Disclosure of Interests to Borrower request for Mortgage ID=418013	
October 01, 2026 04:07 PM EST	Interface	Ng, Margaret	In Progress	Form print - Disclosure - Disclosure of Risks to Unrepresented Borrower request for Mortgage ID=418013	
October 01, 2026 04:07 PM EST	Interface	Ng, Margaret	In Progress	Form print - Disclosure - Disclosure of Representation to Borrower request for Mortgage ID=418013	
October 01, 2026 03:56 PM EST	Event	Ng, Margaret	In Progress	Deal accessed (User ID = 700168)	

About Filogix

Filogix has served as the hub of the Canadian mortgage industry for almost two decades, offering secure, reliable connectivity to brokers and lenders. We provide trusted mortgage lending products, that enable the effective management of the sales process from origination through underwriting. As the mortgage landscape continues to change, Filogix is prioritizing advances to support the industry into the future. We're investing in a more open infrastructure and building connectivity to create a complete mortgage marketplace, helping mortgage professionals do business with more choice, speed and reliability than ever before. Learn more at [filogix.com](https://www.filogix.com)

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