

**Your Personal Financial Statement**

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| Name:  | Date of Birth:  | Social Insurance No.:  |
| Street Address:  | City:  | Province:  | Postal Code:  |
| Home Phone #:  | Residence: [ ]  Own [ ]  Rent | How long at present address? |
|  Years: |   |
| Occupation:  | Currently employed by: | How long with employer? |
| Years: |   | Months:  |   |
| Employer’s Phone #:  | [ ]  Married [ ]  Unmarried (divorced, widowed) | Number of Dependents:   |
| Spouse’s Name:  | Date of Birth:  | Social Insurance No.:  |

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| **Financial Information:** | **As at (date):**  |
| **Assets** |  | **Liabilities** |
|  | Value ($) |  | Balance ($) |
| Cash on HandBank name:  |   | Bank Loans:Bank name:  |   |
| Address:  |   | Address:  |
| Automobile Model:  | Year: |   |   | Mortgages on Real estate owned |   |
| Stocks & Bonds (see schedule A on pg 2) |   |  |   |
| Accounts, Notes Receivable |   | Credit Cards |   |
|   |   |   |   |
| Real Estate Owned (See schedule B on reverse) |   |   |   |
| Retirement Accounts |   | Other Obligations |   |
| Other Assets (i.e. household goods) |   |   |   |
| Life Insurance face value $  |  | Total Liabilities: |   |
| Cash Surrender Value |   | Net Worth:  |   |
| **Total Assets:**  |   | **Total Liabilities and Net Worth:** |   |

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| **Income Sources**  | **Sundry Personal Obligations** |
| Your Gross Monthly Salary | $  | Are you providing your personal support for obligations not listed above (i.e. cosigner, endorser, guarantor)? [ ]  Yes [ ]  No  |
| Your Spouse’s Gross Monthly Salary | $  |
| Net Monthly Rental | $  | Details:  |
| Other Income (Please itemize) | $  |

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| **Schedule A – Stocks and Bonds** |
|  | **Pledged as Collateral** |
| **Quantity** | **Description** | **Market Value** | Yes | No |
|   |   | $  | [ ]  | [ ]  |
|   |   | $  | [ ]  | [ ]  |
|   |   | $  | [ ]  | [ ]  |
|   |   | $  | [ ]  | [ ]  |
|   |   | $  | [ ]  | [ ]  |
|  | Total: | $  | [ ]  | [ ]  |

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| **Schedule B – Real Estate Owner** |
|  | **Type of Property** | **Present Market Value** | **Amount of Mortgage Liens** |
| Property Address:  | [ ] [ ] [ ] [ ]  | ResidentialMulti-UnitCommercialIndustrial | $  | 1st  |
| Street:  | 2nd |
| City:  | Province:  |  |
| Name of Mortgage Holder(s) | First Mortgage:  | Second Mortgage:  |
| Percentage Ownership |   | % | Date Acquired:  | Purchase Price: $  |
|  |
| Property Address:  | [ ] [ ] [ ] [ ]  | ResidentialMulti-UnitCommercialIndustrial | $  | 1st  |
| Street:  | 2nd |
| City:   | Province:  |  |
| Name of Mortgage Holder(s) | First Mortgage:  | Second Mortgage:  |
| Percentage Ownership |   | % | Date Acquired:  | Purchase Price: $  |

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| **General Information (If yes to any of the following please explain)** |
| Have you ever had an asset repossessed? [ ]  Yes [ ]  No | Have you ever declared bankruptcy? [ ]  Yes [ ]  No |
|   |   | Date:  |
| Are you party to any claims or lawsuits? [ ]  Yes [ ]  No | Do you owe any taxes prior to the current year? [ ]  Yes [ ]  No |
|   |   |
|  |
| Date:  | Signature |

**PLEASE DO NOT FORGET TO ATTACH THE FOLLOWING DOCUMENTS (IF APPLICABLE):**

* Copy of the banking statements confirming the balances