INTEGRITY TREE MORTGAGES
ROOTED IN INTEGRITY. FOCUSED ON YOU.

PERSONAL STATEMENT OF AFFAIRS (Business Loans)

Please fill out the form, save, then print, sign

Personal Information					
First Name	Middle Name	Last Name	Social Insurance #	Date of Birth (Mo.____ Day ____Year_____)	
Home Address		City/Town	Province	Postal Code	
Home Phone #	Business Phone #	Residence Since (Year)	Own ☐ Rent ☐ Other ☐	Marital Status	
Employer Name, Address			Employer Phone #	Occupation	Since (Year)

Spouse Information					
First Name	Middle Name	Last Name	Social Insurance #	Date of Birth (Mo.____ Day ____Year_____)	
Employer Name, Address			Employer Phone #	Occupation	Since (Year)

Financial Profile

Assets	Amount ($)	Liabilities	Amount ($)
Cash		Overdrafts	
Cash – Other Financial Institutions		Credit Cards	
Accounts/Loans Receivable		Loans – (Schedule F)	
Marketable Securities (Schedule A)		Loans – Other Lenders (Schedule G)	
Tax Sheltered Investments (Schedule B)		Real Estate Loans (Schedule D)	
Life Insurance (Schedule C)		Other Obligations	
Real Estate (Schedule D)		**(B) Total Liabilities**	
Business Interests (Schedule E)		**(C) Total Net Worth (A - B)**	
Other Assets		Sundry Obligations: are you personally supporting contingent obligations not listed above (e.g. co-signer/endorser/guarantor)? Yes ☐ No ☐	
		If yes, provide details on amount, to whom and the nature of obligations:	
(A) Total Assets			

Most Recent Annual Income (from Notice of Assessment) and Annual Expenses

Income	Amount ($)	Expenses	Amount ($)
Salary, Wages, Bonuses, Commissions		Annual Mortgage Payments	
Investment Income		Property Taxes/Condo Fees	
Net Rental Income		Insurance Premiums	
Other Income		Other Loan Payments (Including Credit Cards)	
Spouse's Gross Income		Other Expenses (i.e. Spousal/Child Support, Child Care, etc.)	
Total Annual Income		**Total Annual Expenses**	

General Information (If you answer "Yes" to any of the questions below, please provide details)

Have you ever had an asset repossessed?	Yes ☐ No ☑	Details:
Are you involved in any claims or lawsuits?	Yes ☐ No ☑	Details:
Have you ever declared bankruptcy?	Yes ☐ No ☑	Details:
Do you owe any back taxes?	Yes ☐ No ☑	Details:

Note: If there is not enough space to list all securities/real estates/other investments owned by you in the schedules below, attach a detailed list to this document.

Schedule A: Marketable Securities (Stocks & Bonds)				
Financial Institution	In Name of	Description (Type of Security)	Market Value ($)	Pledged as Collateral?
				Yes ☐ No ☐
				Yes ☐ No ☐
				Yes ☐ No ☐

Schedule B: Tax Sheltered Investments (RRSPs, RHOSPs, DPSPs, TFSAs, etc.)				
Financial Institution	In Name of	Description (RRSP, etc.)	Market Value ($)	Pledged as Collateral?
				Yes ☐ No ☐
				Yes ☐ No ☐
				Yes ☐ No ☐

Schedule C: Life Insurance (Individual and Group)				
Insurance Company	Beneficiary	Face Value ($)	Policy Loans ($)	Cash Surrender Value ($)

Schedule D: Real Estate			
Primary Residence	Street Name and Number	City/Town	Province
Title in Name of		% Ownership	Date Acquired (Month/Year)
Purchase Price ($)	Current Market Value ($)	Name of Mortgage Lender	Mortgage Balance Outstanding ($)
Other	Street Name and Number	City/Town	Province
Title in Name of		% Ownership	Date Acquired (Month/Year)
Purchase Price ($)	Current Market Value ($)	Name of Mortgage Lender	Mortgage Balance Outstanding ($)

Schedule E: Business Interests (List all businesses in which you have an ownership interest)				
Business Name	% Ownership	Industry	Since (Year)	Business Total Net Worth ($)

Schedule F: Loans (Excluding Mortgages Listed in D Above)		
Type of Loan	Credit Limit ($)	Outstanding Balance ($)

Schedule G: Other Lender's Loans (Excluding Mortgages Listed in D Above)			
Lender's Name	Type of Loan	Credit Limit ($)	Outstanding Balance ($)

Declaration: I/we certify that all the information provided above and on any accompanying statements is to the best of my/our knowledge, true, complete and correct, and understand it will be used by Integrity Tree Mortgages ("you") to determine credit worthiness. The proceeds of the loan applied for will be used for business purposes and not for personal, family or household purposes. I/we acknowledge receipt of notice that from time to time reports about me/us may be obtained by you from credit reporting agencies. If you have my/our social insurance number, you may share it with credit reporting agencies as an aid to identify me/us. I/we further consent to you making any inquiries you deem necessary to reach a decision on any loan application, and consent to the disclosure at any time of any credit information about me/us to credit reporting agencies or to anyone with whom I/we have financial relations

Signature: _____ Date: _____

Signature: _____ Date: _____