

Name		Date of Birth (DD/MM/YYYY)		Social Insurance No. (Optional)	
Street Address		City		Province	
Postal Code					
Home Phone No.		Residence <input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other		How long at present address? Years Months	
Occupation		Currently Employed by (Inc. Address)		How long with employer? Years Months	
Employer's Phone No.		<input type="checkbox"/> Married <input type="checkbox"/> Unmarried (This includes single, divorced and widowed) <input type="checkbox"/> Separated		Number of dependents	
Your Principal financial institution & address				Account No.	

PERSONAL DATA ON YOUR SPOUSE		Under the laws of Canada or the provinces your spouse may have a legal interest in your assets		Note: If this section is completed, your spouse must sign in the space provided on the bottom of page 2.	
Spouse's Name		Date of Birth (DD/MM/YYYY)		Social Insurance No.	
Spouse's Occupation					
Spouse currently employed by (Inc. address)		How long with employer? Years Months		Spouse's work phone no.	

FINANCIAL INFORMATION				Date (DD/MM/YYYY)	
AS AT					
ASSETS List and describe all assets			LIABILITIES List credit cards, open lines of credit, and other liabilities (including alimony and child support)		
		VALUE		BALANCE OWING	MONTHLY PAYMENT
Total Chequing Balances		\$	Bank Loans	\$	\$
Total Savings Balances			Mortgages on Real Estate Owned		
Life Insurance Cash Value			*See Schedule B on page 1 & 2		
Automobile Make Model Year					
Automobile Make Model Year					
Stocks & Bonds (see Schedule A on page 1)			Monthly Rent Payment		
Accounts / Notes Receivable (Please itemize)			Credit Cards (Please itemize)		
Real Estate Owned (see Schedule B on page 1 & 2)					
Retirement Account (e.g. : RRSP)			Other Obligations (Please itemize)		
Other Assets (Household Goods, etc.) (Please itemize)					
			TOTAL MONTHLY PAYMENTS		\$
			TOTAL LIABILITIES (II)	\$	
TOTAL ASSETS (I)		\$	NET WORTH (I - II)	\$	

INCOME SOURCES		Income from alimony, child support or separate maintenance does not have to be stated unless you want it considered.		SUNDRY PERSONAL OBLIGATIONS	
Your Gross Monthly Salary		\$		Please provide details below if you answer Yes to the following question.	
Spouse's Gross Monthly Salary				Are you providing your personal support for obligations not listed above (i.e., cosigner, endorser, guarantor)? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Net Monthly Rental (from Schedule B on page 1 & 2)				Details of any of the above	
Other Income (Please itemize)					
TOTAL		\$			

SCHEDULE A STOCKS AND BONDS					
Quantity	Description	Where Quoted	Market Value	Pledged as Collateral	
				Yes	No
			\$		
TOTAL			\$		

SCHEDULE B REAL ESTATE OWNED		Please provide information on your share of real estate owned						
PROPERTY ADDRESS (Primary residence)		Type of Property	Present Market Value	Amount of Mortgage Liens	Gross Monthly Rental Income	Monthly Mortgage Payments	Monthly Taxes insur. Misc and Maintenance	Net Monthly Rental Income
Plan No.:	Lot No.:							
Street			\$	1st		1st		
City	Province			\$ 2nd	\$	\$ 2nd	\$	\$
				\$		\$	\$	
NAME AND ADDRESS OF MORTGAGE HOLDER(S)		First Mortgage		Maturity Date	Second Mortgage			Maturity Date
REGISTERED OWNER(S)	% Owned	Month/Year Acquired MMM YYYY			Purchase Price \$			

