



# PERSONAL STATEMENT OF AFFAIRS

DATE

## Personal Information

FIRST NAME                      MIDDLE NAME                      LAST NAME                      SOCIAL INSURANCE NO.                      DATE OF BIRTH

HOME ADDRESS - STREET & NUMBER                      CITY                      PROVINCE                      POSTAL CODE

HOME TEL NUMBER                      CELL NUMBER                      BUSINESS TEL NO.                      EMAIL ID

RESIDENCE OWNED OR RENT?                      MARRITAL STATUS                      NO. OF DEPENDENTS                      PRINCIPAL BANK

## Employment Information

EMPLOYER'S NAME & ADDRESS

OCCUPATION                      BUSINESS TEL NO.                      YEARS THERE

PREVIOUS EMPLOYER'S NAME & ADDRESS (if less than 2 Years in current employment)

OCCUPATION                      BUSINESS TEL NO.                      YEARS THERE

## Data on Spouse

FIRST NAME                      MIDDLE NAME                      LAST NAME                      SOCIAL INSURANCE NO.                      DATE OF BIRTH

OCCUPATION                      CELL NUMBER                      BUSINESS TEL NO.                      EMAIL ID

EMPLOYER'S NAME & ADDRESS                      YEARS THERE

Present Annual Income		Expenses	
<b>Your Gross Income</b>	\$	<b>Your Expenses</b>	\$
Annual Salary or Wages		Mortgage/ Rental Payment	
Commissions & Bonuses		Real Estate Taxes	
Dividends & Interests		Federal & Provincial Taxes	
Rental Income (As per Schedule )		Insurance Premiums	
Other Income (Please itemize)		Credit Card Payments	
1		Alimony or Child Support	
2			
<b>Subtotal</b>	<b>\$</b>	Other Expenses/ Debts	<b>\$</b>
<b>Spouse's Gross Income</b>		1	
Annual Salary or Wages		2	
Other Income (Please itemize)		3	
1			
2			
<b>Total Annual Income</b>	<b>\$</b>	<b>Total Expenses</b>	<b>\$</b>
			-



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## General Information (If you answer YES to any of the questions, please provide details)

Questions	Yes / No	Details
Have you ever had an asset repossessed?		
Are you involved in any claims or lawsuits?		
Have you ever declared Bankruptcy?		
Do you owe any back taxes?		

## Schedule A - Marketable Securities

No. of Units/ Shares	Description	In the name of whom	Market Value	Available as Collateral
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## Schedule B - Real Estate 1. Primary Residence 2. Other Property

1. Street Name & Number	City	Province	% Ownership
Title in the name of	Date Acquired	Purchase Price	Market Value
Name of Mortgage Holder	Mortgage Balance - 1st	Mortgage Balance - 2nd	Annual Mortgage Pymts

2. Street Name & Number	City	Province	% Ownership
Title in the name of	Date Acquired	Purchase Price	Market Value
Name of Mortgage Holder	Mortgage Balance - 1st	Mortgage Balance - 2nd	Annual Mortgage Pymts

## Schedule C - Individual & Group Life Insurance

Insurance Company	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value
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## Schedule D - Retirement Accounts (Tax Sheltered Investments)

Administrator / Bank	Quantity	Description	In Name of whom	Current Value
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## Schedule E - Business Interests

List all Business in which you are an Owner	% Ownership & Yr. Est.	Net Worth of Business	Type Of Business
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## Schedule F - Bank Loans (Exclude Real Estate Loans)

Lender/ Bank	Purpose	Date of Loan	Collateral Security	Outstanding Balance
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# NET WORTH CALCULATOR

DATE

Estimated Net Worth: \$

Assets	
Cash or Cash Equivalent	Estimated Value
Checking account	\$
Savings account	
Certificates of deposit/ GIC's	
Money market account/ Bonds	
<b>Real Estate (As per Schedule B)</b>	
Home / Principal Residence	
Real estate other than home	
<b>Life Insurance Policies ( Schedule C)</b>	
Life insurance (cash value)	
Other	
<b>Investments ( As per Schedule D)</b>	
Retirement account	\$
Bonds	
Mutual funds	
Individual stock shares	
<b>Other Business Interests ( As per Schedule E)</b>	
Business	\$
Other Investments	
<b>Personal Items</b>	
Accounts and Loans Receivable	\$
Vehicle 1 -	
Vehicle 2 -	
Jewelry / Gold	
Artwork	
Other Personal Assets	
<b>Assets Total</b>	<b>\$</b> <input type="text"/>

Liabilities	
Loan Balances	Estimated Value
Mortgage loan	\$
Home equity loan / Line of Credit	
Car Loan 1	
Car loan 2	
<b>Real estate loans</b>	
Real estate loans	
Student loans	
<b>Investment Loans</b>	
RSP / Investment Loans	
Other loans	
<b>Other Outstanding Debt</b>	
Credit Card debt	\$
Unsecured Lines Of Credit	
Other debt -	
<b>Liabilities Total</b>	<b>\$</b> <input type="text"/>

## Declaration

The undersigned hereby declare(s) that all the information provided herein and on the accompanying statements is/ are to the best of my/ our knowledge true complete and correct and understand it will be used by the Lender/ Bank 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. The undersigned further consent(s) to Canadawide Financial Corporation (CFCL) and/ or their appointees making any enquiries it/ they deem(s) necessary to reach a decision on this application and consent(s) to the disclosure at any time of any credit information about me/ us to any credit reporting agency or to anyone with whom I/ we have financial relations.

Per

Signature of Applicant

Signature of Applicant

Date