

PART 1 — PERSONAL INFORMATION & SIGNATURE

APPLICANT 1

Full legal name (First Name, Last Name)

MAILING ADDRESS

Street Address

City Province Postal Code

SIN Date of birth

Email

Phone number

Signature

Date

APPLICANT 2 (if applicable)

Full legal name (First Name, Last Name)

MAILING ADDRESS

Street Address

City Province Postal Code

SIN Date of birth

Email

Phone number

Signature

Date

PART 2 — FINANCIAL HISTORY

- | | | | | |
|---|-----|--------------------------|----|--------------------------|
| Have you bought or sold a house in the last 5 years? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Have you disposed of any assets in the last 12 months? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Do you have life insurance with a cash surrender value? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Do you have an RRSP, and have you made contributions in the last 12 months? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Do you have an RDSP, and have you made contributions in the last 12 months? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Do you have an RESP? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Do you have a TFSA? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |

PART 3 — HOUSEHOLD INCOME AND MANDATORY PAYMENTS

INCOME SOURCE	APPLICANT 1	APPLICANT 2
Net employment income (after taxes)	\$ <input type="text"/>	\$ <input type="text"/>
Work pensions	\$ <input type="text"/>	\$ <input type="text"/>
Gov't pensions	\$ <input type="text"/>	\$ <input type="text"/>
Child support	\$ <input type="text"/>	\$ <input type="text"/>
Child care benefit	\$ <input type="text"/>	\$ <input type="text"/>
Spousal support	\$ <input type="text"/>	\$ <input type="text"/>
EI benefits	\$ <input type="text"/>	\$ <input type="text"/>
Ontario Works	\$ <input type="text"/>	\$ <input type="text"/>
Trillium (if received monthly)	\$ <input type="text"/>	\$ <input type="text"/>
Gross self-employment income	\$ <input type="text"/>	\$ <input type="text"/>
Net self-employment income	\$ <input type="text"/>	\$ <input type="text"/>
Other income	\$ <input type="text"/>	\$ <input type="text"/>
TOTAL MONTHLY INCOME	\$ <input type="text"/>	\$ <input type="text"/>

PART 4 — ASSETS

Net = Estimated Value minus Debt Owning. This field calculates automatically and may be negative.

ASSET	ESTIMATED VALUE	DEBT OWING	NET
PERSONAL ASSETS			
Real estate property 1	\$	\$	\$
Real estate property 2	\$	\$	\$
Real estate property 3	\$	\$	\$
Vehicle 1	\$	\$	\$
Vehicle 2	\$	\$	\$
Cash	\$	\$	\$
Bank account	\$	\$	\$
Furniture	\$	\$	\$
Life insurance / RRSP	\$	\$	\$
Securities	\$	\$	\$
Recreational vehicle	\$	\$	\$
Tax refund	\$	\$	\$
Other	\$	\$	\$
PERSONAL SUBTOTAL	\$	\$	\$
BUSINESS ASSETS			
Real estate property 1	\$	\$	\$
Real estate property 2	\$	\$	\$
Real estate property 3	\$	\$	\$
Vehicle 1	\$	\$	\$
Vehicle 2	\$	\$	\$
Cash / bank account	\$	\$	\$
Furniture & fixtures	\$	\$	\$
Equipment / tools	\$	\$	\$
Inventory	\$	\$	\$
Accounts receivable	\$	\$	\$
Tax refund	\$	\$	\$
Other	\$	\$	\$
BUSINESS SUBTOTAL	\$	\$	\$
TOTAL (PERSONAL + BUSINESS)	\$	\$	\$

PART 5 — PERSONAL LIABILITIES

Examples of PERSONAL liabilities and debts include:

- Bank loans (except real property mortgage)
- Finance company loans
- Credit cards — bank/trust company issuers
- Credit cards — other issuers
- Taxes — federal/provincial/municipal
- Student loans — OSAP, bank loan, etc.
- Loans from individuals
- Other

CREDITOR	ACCOUNT NUMBER	AMOUNT
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$
6.		\$
7.		\$
8.		\$
9.		\$
10.		\$
11.		\$
12.		\$
13.		\$
14.		\$
15.		\$
16.		\$
17.		\$
18.		\$
19.		\$
20.		\$
21.		\$
22.		\$
23.		\$
24.		\$
TOTAL LIABILITIES		\$

PART 6 — BUSINESS LIABILITIES

Examples of BUSINESS liabilities and debts include:

- Bank loans (except real property mortgage)
- Finance company loans
- Credit cards — bank/trust company issuers
- Credit cards — other issuers
- Taxes — federal/provincial/municipal
- Business loans — CERB, CDAP, HASCAP, etc.
- Loans from individuals
- Other

CREDITOR	ACCOUNT NUMBER	AMOUNT
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$
6.		\$
7.		\$
8.		\$
9.		\$
10.		\$
11.		\$
12.		\$
13.		\$
14.		\$
15.		\$
16.		\$
17.		\$
18.		\$
19.		\$
20.		\$
21.		\$
22.		\$
23.		\$
24.		\$
TOTAL LIABILITIES		\$