

## General Information

Full Legal Name			Social Insurance Number	Birth Date (dd/mmm/yyyy)
Address		City / Province	Postal Code	How Long
Previous Address		City / Province	Postal Code	How Long
Home Phone	Business Phone	Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed		No. of Dependents
Employer			Position	How Long
Previous Employer			Position	How Long
Spouse Name			Social Insurance Number	Birth Date (dd/mmm/yyyy)
Financial Institution		Address		Account Number

Purpose of the loan proceeds: \_\_\_\_\_

## Financial Statement

Amounts as at \_\_\_\_\_ . Schedules on following page must be completed.

ASSETS		Date	LIABILITIES	
Cash	_____	\$	Loans	_____ \$
Other	_____	\$	Other	_____ \$
RRSPs	_____	\$	Mortgages (Schedule 3)	_____ \$
Other	_____	\$	Loans and Other Debts (Schedule 4)	_____ \$
Stocks, Bonds, Mutual Funds (Schedule 1)	_____	\$	Taxes Payable	_____ \$
Receivable (Schedule 2)	_____	\$	Unpaid Interest	_____ \$
Real Estate (Value) (Schedule 3)	_____	\$	Credit Cards	_____ \$
Life Insurance (CSV) (Schedule 5)	_____	\$	_____	_____ \$
Automobiles (Make, Model, Year)	_____	\$	Other	_____ \$
_____	_____	\$	_____	_____ \$
Other	_____	\$	_____	_____ \$
_____	_____	\$	_____	_____ \$
_____	_____	\$	_____	_____ \$
_____	_____	\$	_____	_____ \$
<b>Total Assets (A)</b>	<b>\$</b> _____		<b>Total Liabilities (B)</b>	<b>\$</b> _____
<b>NET WORTH (A-B)</b>		<b>\$</b> _____		

ANNUAL INCOME			ANNUAL EXPENDITURES	
Salary, Wages, & Commissions	_____	\$	Property Taxes & Assessment	_____ \$
Rents (Gross)	_____	\$	Income Taxes	_____ \$
Business or Professional Income (Net)	_____	\$	Mortgage or Rent	_____ \$
Dividends & Interest	_____	\$	Loan Payments	_____ \$
Other	_____	\$	Credit Card Payments	_____ \$
_____	_____	\$	Insurance Premiums	_____ \$
_____	_____	\$	Estimated Living Expenses	_____ \$
_____	_____	\$	Other	_____ \$
<b>Total Annual Income</b>	<b>\$</b> _____		<b>Total Expenditures</b>	<b>\$</b> _____

The foregoing information and the information on page 2 and on each schedule is submitted for the purpose of establishing or maintaining credit with BlueShore Financial Credit Union and is a true, full, and correct statement of my financial condition as of the date shown.

I hereby authorize BlueShore Financial Credit Union to obtain any information deemed necessary about me, including but not confined to, reports from credit bureaus, retail credit companies, or any other source agency the Credit Union deems appropriate.

Signature \_\_\_\_\_

Date (dd/mmm/yyyy) \_\_\_\_\_

## General Questions (Attach schedules if necessary)

Are you a guarantor on anyone's debt? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide details:
Are there any suits or judgements against you? <input type="checkbox"/> Yes <input type="checkbox"/> No Any pending? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes (past or pending) provide details:
Are you now or have you ever been bankrupt? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide details:
Do you have any liabilities under leases for property or equipment leased by you? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide details:
Are any assets presently involved in a marriage or separation agreement? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide details.
Do you have any personal / business income tax liabilities? <input type="checkbox"/> Yes <input type="checkbox"/> No What was the date / year of your last income tax return filing?
Indicate if you or your business are involved in any of the following industries: Money services/foreign exchange? <input type="checkbox"/> Cheque Cashing? <input type="checkbox"/> Gambling operations? <input type="checkbox"/> Cryptocurrency? <input type="checkbox"/> Cannabis? <input type="checkbox"/> None of the above: <input type="checkbox"/>
Have the cash deposits or investments declared on the personal net worth statement been on deposit at your financial institution for at least 3 months? <input type="checkbox"/> Yes <input type="checkbox"/> No
Briefly describe the source of your personal wealth (assets, income). For example, business earnings, employment income, growth in investments and/or real estate holdings, inheritance, funds from overseas: _____

## Schedules (If you require additional room, please attach separate page.)

### Schedule 1 - Stocks, bonds, Mutual Funds

No. of Shares or Par Value of Bonds	Description	Registered in Name of	Listed	Price	Market Value
<b>Total</b>					

### Schedule 2 - Receivables (other income)

Name of Payer	Location & Description	Original Amount	Property Value	Joint Tenant	1st / 2nd	Balance
<b>Total</b>						

### Schedule 3 - Real Estate

Location & Description	*	Registered in Name of	Year Purchased	Cost	Lender	Value	Monthly Payment	Rate	Mortgage Balance
<b>Total</b>									

\*I=Improved U=Unimproved

### Schedule 4 - Loans and other Debts

Payable To	Collateral Description, if secured	Monthly Payment	Final Payment Due	Amount
<b>Total</b>				

### Schedule 5 - Life Insurance

Face Amount	Beneficiary	Issuer	Cash Surrender Value (CSV)
<b>Total</b>			

Transfer totals to page 1