

PERSONAL FINANCIAL STATEMENT

First Name:		Last Name:	
Address:		City:	
Postal code:		At this address since: MM/YY	
Own or Rent:		Previous Address: If less than 2 years at current address	
Home Tel/Cell:		Marital Status:	
Date of Birth: MM/DD/YY		Number of Dependents:	
Social Insurance Number:		Email:	
Employer & employer's address:		Length of employment with current employer:	
Spouse's full name:		Spouse's Date of Birth: MM/DD/YY	
Spouse's Social Insurance Number:		Spouse's occupation:	
Spouse's employer & employer's address:		Spouse's length of employment with current employer:	

OTHER INFORMATION:

Are you party to any claims or lawsuits? Yes <input type="checkbox"/> No <input type="checkbox"/>	Do you owe any taxes in this year or prior years? Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you signed as a guarantor for credit? Yes <input type="checkbox"/> No <input type="checkbox"/>	Have you or your spouse ever declared bankruptcy? Yes <input type="checkbox"/> No <input type="checkbox"/>
If you answered YES to any of the above questions provide or attach a detailed explanation:	

DISCLOSURE AND RELEASE STATEMENT

To: Enterprise Brant

I/We certify the above statement of my property and debts, including information contained in the appropriate schedules, are true. I/We declare that neither my spouse nor any other person has any claim in or to the assets shown above except as set out therein. The whole of my/our property is shown at a fair valuation. I am not being sued and there are no executions against me, neither do I owe anything except as reported above.

I/We hereby authorize Enterprise Brant to at any time obtain such factual and investigate information regarding me/us from any credit bureau, chartered bank, or any other person in connection with advisory, consultative, administrative or financing services as permitted by law to furnish other consumer credit grantors and credit bureau with particulars of the credit application and subsequent credit experience, if applicable and to retain this application for the Enterprise Brant records.

I/We acknowledge that FedDev and/or the Ministry of Training Colleges & Universities or their successor(s) may have access to the records of the business at any time.

Statement, information and consent must be completed, signed, and witnessed before the application can be processed.				
Applicant name: (print)	Applicant signature:	Date:	Witness name: (print)	Witness signature:
1)				
2)				

For Office use only:

NOTE: This information must be submitted for each of the principals of the business in partnerships or incorporations. Witness cannot be an employee or family member.

STATEMENT OF PERSONAL ASSETS AND LIABILITIES

Name: _____

ASSETS (own)	INSTITUTION	AMOUNT
CASH		\$
RRSP's (self)		\$
RRSP's (spouse)		\$
Stocks, Bonds, Mutual Funds	Describe	\$
Real Estate Property (1)	Address – Year purchased & amount purchased – Date appraised	\$
Real Estate Property (2)	Address – Year purchased & amount purchased – Date appraised	\$
Vehicle (1)	Year, make, model	\$
Vehicle (2)	Year, make, model	\$
Other assets	Description	\$
① TOTAL ASSETS		\$

LIABILITIES (owe)	INSTITUTION	AMOUNT
Personal Loans or LOC	Bank, address	\$
Mortgage (1)	Property address, mortgage company, branch	\$
Mortgage (2)	Property address, mortgage company, branch	\$
Vehicle Loan or Lease (1)	Motor co., Bank, term of lease or loan	\$
Vehicle Loan or Lease (2)	Motor co., Bank, term of lease or loan	\$
Credit Cards Visa & M/C	List cards:	\$
Credit Cards (other)	List company names:	\$
Other	Description	\$
② TOTAL LIABILITIES		\$
Calculate – Your Net Worth = ① - ② (Total Assets minus Total Liabilities) =		\$

STATEMENT OF INCOME AND EXPENDITURES (ANNUALLY)

INCOME	ANNUALLY	EXPENDITURES	MONTHLY	ANNUALLY
Salaries, Wages - (self) (before taxes)	\$	Mortgage / Rent / Property tax	\$	\$
Salaries, Wages - (spouse) (before taxes)	\$	Income Taxes, CPP, EI, RRSP's	\$	\$
Rental Income	\$	Total Loan Payments	\$	\$
Other Income: EI, CPP	\$	Total Credit Card Payments	\$	\$
Other child support, child tax benefit, pensions,	\$	Estimated Living Expenses: Utilities, food, recreation, gas, daycare, medical, telephone, cable, insurance	\$	\$
③ TOTAL INCOME	\$	④ TOTAL EXPENDITURES....	\$	\$
Calculate – Your Disposable Annual Income = ③ – ④ = (Total Annual Income minus Total Annual Expenditures)			\$	
This information must be consistent with "Personal Expenses" in the Cash Flow Forecast Tool				