



Please complete the following application and fax to (519) 759-0098. Questions? Contact us at 519-752-4636.

PERSONAL FINANCIAL STATEMENT

First Name: _____ Last Name: _____

Street Address _____ P.O. Box (if applicable) _____

City: _____ Province: _____ Postal Code: _____

At this address since: ____/____/____ Own or Rent? Own Rent
mo year

Tel: () _____ Mobile: () _____ email: _____

Previous Address (If less than two years at current address)

Physical Address: _____ City: _____ Prov: _____

Postal Code: _____ At this address from: ____/____/____ to ____/____/____
mo year mo year

Marital Status: Married Single Widowed Other (please state) _____

Date of Birth ____/____/____ Number of Dependents: _____
mo day year

Social Insurance Number _____

Employer: _____

Employer Address: _____ City: _____

Length of employment with current employer: Years: ____ Months: ____

Spouse's Name Check Box if Not Applicable

First Name: _____ Last Name: _____

Date of Birth ____/____/____ Social Insurance Number _____
mo day year

Spouse's Occupation: _____ Spouse's Employer: _____

Employer Address: _____ City _____

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				

OTHER INFORMATION

Are you party to any claims or lawsuits? Yes No

Do you owe any taxes in this year or prior years? Yes No

Have you signed as a guarantor for credit? Yes No

Have you or your spouse ever declared bankruptcy? Yes No

If you answered YES to any of the above questions 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 the Federal Economic Development Agency for Southern Ontario or their successor may have access to the records of the business at any time.

Signature

Date

Spouse's Signature

Date

[Click here to download Part 2: LOAN PURPOSE AND ASSETS](#)