



## Personal Financial Statement

<b>Name:</b>	Date of Birth:	Sin:	Marital Status
C-Applicant:	Date of Birth:	Sin:	# of Dependents
Address:		How Long:	Phone# Home Work:
Employer:	Occupation		How Long: Yrs
Co-Applicant Employer:	Occupation		How Long: Yrs

### FINANCIAL CONDITION AS AT:

ASSETS		AMOUNT	LIABILITIES		AMOUNT	
<b>CASH</b>	Cash		<b>NOTES PAYABLE TO BANKS</b>			
	GICs (Schedule 1)			Other (Itemized Schedule 5)		
	RRSP (Schedule 1)					
<b>STOCKS</b>	Listed (Schedule 2)		<b>OTHER NOTES &amp; ACCOUNTS PAYABLE</b>	Real Estate Loans (Schedule 4)		
	Unlisted (Schedule 2)			Sales Cont & Chattel Mtgs (Sch 5)		
<b>BONDS</b>	(Schedule 2)			Loans on Life Ins Policies (Sch 5)		
<b>ACCOUNTS &amp; NOTES RECEIVABLE (COLLECTIBLE)</b>	Regular (Schedule 5)			Accounts Payable		
	Agreements for Sale & Mtgs (Sch.3)					
	Relatives & Friends (Schedule 5)					
<b>REAL ESTATE</b>	Improved (Schedule 4)			<b>TAXES PAYABLE</b>	Current Years Income Taxes Unpaid	
	Unimproved (Schedule 4)				Prior Year's Income Taxes Unpaid	
	Leasehold Interest Owned				Real Estate Taxes Unpaid	
	Other					
<b>LIFE INSURANCE</b>	Ins Company:		<b>OTHER LIABILITIES</b>	Unpaid Interest		
	Face Amount: \$			Others (Attach Details)		
	Beneficiary:					
	Cash Surrender Value					
<b>OTHER PERSONAL</b>	Automobile					
	Other Attach Details					
<b>Total Assets</b>				<b>Net Worth</b>		
				<b>Total Liabilities</b>		

Annual Income		Annual Expenditures	
Salary, Wages, Commissions Etc		Property Taxes & Assessments	
Dividends and Interest		Income Taxes	
Rentals (Gross)		Real Estate Loan Payments of Rent	
Business or Professional Income (Net)		Payments on Contracts & Other Notes	
Other Income (Describe)		Insurance Premiums	
		Estimated Living Expenses	
		Other	
<b>Total Income</b>		<b>Total Expenditures</b>	

The foregoing information is submitted for the purpose of establishing credit and is a true, full and correct statement of my financial condition as of the date shown.

I hereby authorize Avenue Financial to obtain any background information it deems necessary concerning this application, including but not confined to, reports from the credit bureaus, retail credit company, Dun & Bradstreet, or any other source or agency that Avenue Financial considers appropriate.

I agree to notify you immediately of any material change of condition while indebted to you. In the event that such notification is not given, or if other acts occur that, in your opinion, either do or could adversely affect the Funder's interest, then any and all outstanding obligations may, at your election, become due and payable without demand or notice and may be charged against any and all assets of the undersigned in possession or control of the Funder

I hereby authorize any bank, insurance company or other lender or financial institution or agency to disclose to you any information they may have pertaining to my financial affairs and for so doing this shall be their good and sufficient authority.

**PRIVACY**

- I. Personal Information is information that identifies you. It includes your name and address, your age and gender, your personal financial records, identification numbers such as your Social Insurance Number, personal references, and employment records.
- II. We only collect personal information from you for legitimate reasons - which include: to identify you; to protect you and us against fraud and error; to comply with legal requirements; to understand your needs; to determine your eligibility for our products and services; and to help us match our products and services to your needs. We won't collect more information that we need, and we will tell you why we need it. We will, under normal circumstances, obtain your consent to collect, use, or disclose, your personal information.
- III. We may tell you about products or services through direct mail, by phone, or by other means. If you do not wish us to do so, contact your branch and they will note your preference on your account record. This would not limit information you may receive with or in your account statement, or during conversations with our staff.
- IV. If you have any questions about the personal information we have on our file on you, contact your funders branch

Date Signed: \_\_\_\_\_

(Sign Here) \_\_\_\_\_

Are you a guarantor, co-maker or endorser on anyone's debt? \_\_\_ Give details: \_\_\_\_\_  
 \_\_\_\_\_ (if necessary, use separate sheet)

Do you have any other business connection? \_\_\_ Give details: \_\_\_\_\_  
 Are there any suits or judgments against you? \_\_\_ Any Pending? \_\_\_\_\_  
 Have you ever gone through bankruptcy? \_\_\_ Give details: \_\_\_\_\_  
 Have you previously borrowed from other banks? \_\_\_ Which ones? \_\_\_\_\_  
 Liabilities under leases? \_\_\_\_\_  
 Are any of your assets pledged or in any other manner unavailable for payments of your debts? \_\_\_ If so give details: \_\_\_\_\_

**Schedule 1: GIC'S & RRSP'S**

Financial Institution	Description	Principal Amount	Rate	Maturity Date (DD/MM/YY)

**Schedule 2: Listed & Unlisted Stocks and Bonds Owned**

No of shares or Par Value of Bonds	Description	Registered in Name of	Listed	Price	Market Value

**Schedule 3: Agreements for Sale and Mortgages Receivable**

Name of Payor	Legal Desc, Street Address & Type of	Improvement Orig Amount	Unpaid Balance	Joint Tenancy?	Terms	1 <sup>st</sup> or 2 <sup>nd</sup> Lien	Value of Property

**Schedule 4: Real Estate Owned (Designate: I – Improved U – Unimproved)**

Location or Description	Title in Name of	Cost	Present Value	Agreements for sale, Mortgages or Other Liens				Maturity Date (DD/MM/YY)
				Unpaid	Rate	Mthly Pmt	Held By	
		<b>Total</b>		<b>Total</b>				

**Schedule 5: Supporting Details of Receivables and Payables Shown on Reverse Side**

Receivables				
Name of Payer	Amount	Monthly Payment	Final Payment Due	Describe Collateral if Secured
<b>Total</b>				

Liabilities – To Whom Payable				
Name of Payee	Amount	Monthly Payment	Final Payment Due	Describe Collateral if Secured
<b>Total</b>				

IF NECESSARY PLEASE USE SEPARATE SHEET FOR DETAILS