General information

The sponsorship that you wish to undertake is subject to financial requirements. You must complete the French version of this form to enable us to assess your financial situation and determine whether you have had sufficient financial resources over the past 12 months to provide for the basic needs of persons you wish to sponsor and the members of their family, whether accompanying them or not, and whether you will continue to have these resources through the entire duration of your undertaking (Sections 3 to 5 of the form). Our evaluation will take into account:

- Your overall income and that of your spouse who co-signs the undertaking, if applicable.
- The income necessary to provide for the basic needs of your own family unit
- The income necessary to provide for the basic needs of the person(s) you wish to sponsor and, where applicable, their family members, whether or not they are accompanying the sponsored person(s)
- The income necessary to provide for the basic needs of any person who you may have already sponsored.

Note that we take into account only annual income from Canadian sources such as:

- Your gross salary and that of your spouse who co-signs the undertaking
- Your **net** corporate or self-employment income and that of your spouse who co-signs the undertaking, if applicable.
- The real amount of your dividends (received as income) and that of your spouse who co-signs the undertaking, if applicable.

If your personal employment income is insufficient to meet the regulatory requirements, your spouse or de facto spouse may co-sign the undertaking with you. The spouse must complete the form (Sections 2.2 and 6 to 8) and provide his or her own financial documents. Both of you will thus be bound by this undertaking and will be jointly and severally liable for the obligations contracted with regard to the persons who you are sponsoring.

For information regarding the scales in effect for the current year, consult the <u>Sponsor's Guide</u> or our website at <u>www.immigration-quebec.gouv.qc.ca</u>, <u>Sponsors and sponsored persons</u>, section on "<u>financial capacity evaluation</u>." You can also use the <u>electronic calculator</u> to learn the income requirements depending on your situation.

If you estimate that your personal employment income combined with that of your spouse or de facto spouse is insufficient to meet the financial requirements, you should then answer the questions on your other assets and income sources (Sections 5 and 8) and provide all the requested documents. This information will help us carry out a comprehensive examination of your assets and determine whether you have the financial capacity to assume an undertaking.

Important

Make sure to attach all required documents to the form or your application may be returned to you.

We will not return any documents that you submit in support of your application. You must therefore send us copies, except in the few cases where originals are required (please keep copies of these originals for your files).

Please fill out and sign the french version of this form. This English translation is included only to help you do so accurately.

Financial capacity evaluation

Read the **Sponsor's Guide** before completing this form

	1	1. Composition of your famil	у					
Write your family and first name(s) in block letters on the screen or by hand	• 1	1.1 Information on your identity		H				
in blue or black ink.	Fá	amily name at birth		First name(s)				
	1	1.2 Information on the identity of y	our spouse	11				
	Fa	amily name at birth		First name(s)				
	_ Da	Date of birth (year/month/day)		Status: Spo	use	☐ De facto spouse		
If your personal income	- 1	1.3 Is your spouse co-signing the u	ndertaking with you	?				
is insufficient to satisfy the scales in effect, your spouse may co-sign the undertaking with you.		If yes, he or she must complete Sec depending on his or her situation a			quired doc	uments	☐ Yes	
Enter the information requested	- 1	1.4 Information on the identity of y	our dependent child	dren				
for each of your children and those of your spouse	Ε	Enter all children, indicating for each th	ne letter corresponding	to his or her situ	ıation based	d on the following crit	eria:	
who meet the stated criteria, including children who do not	А	A Child under 19 years of age who is neither married nor a de facto spouse						
live with you and those who live outside Canada.	В	B Child aged 19 or older who is financ			ental disabi	lity		
		Family name	First nam	ne(s)	Sex Male (M) Female (F)	Date of Birth year/month/day	Situation:	

Family name	First name(s)	Sex Male (M) Female (F)	Date of Birth year/month/day	Situation:
Children from your current union				
.5				
Children from your previous union	ns .			

	1.5 Check the box if you have no c in A or B (Point 1.4).	hildren, or if none of your childr	en meet the crite	eria described	
	1.6 Check the box if your spouse o meet the criteria described in A	r de facto spouse has no childre or B (Point 1.4).	n, or none of his	or her children	[
You must declare all your undertakings either as a guarantor, co-guarantor or co-signer. Provide the information requested on each person who you have already sponsored and who has obtained the status of permanent resident or is awaiting his status.	2. Previous undertakings 2.1 Undertakings assumed by the Have you already assumed one or mo If yes, provide the requested info If no, go to Section 2.2		☐ Yes ☐ No		
	Family name	First name(s)	Sex Male (M) Female (F)	Date of Birth year/month/day	Date permanent resident status obtained, where applicable
Your spouse must complete this section only if he or she co-signing the undertaking.	2.2 Undertakings assumed by the Have you assumed one or more spon If yes, provide the requested info	sorship undertakings before this	s one, apart from		Yes
	If no, go to Section 3				No
	Family name	First name(s)	Sex Male (M) Female (F)	Date of Birth year/month/day	Date permanent resident status obtained, where applicable



Before completing this section, consult the scales in effect for the current year. It can be found in the <u>Sponsor's Guide</u> or in the <u>Financial Capacity Evaluation</u> section of our website. You can also use the <u>electronic calculator</u> to find out the income requirements based on your situation.

SOURCE OF INCOME OR OTHER ASSETS OF THE GUARANTOR

Only annual income	3.	Information on your employment		Documents to provide
from Canadian sources is taken into account.	3.1	Do you currently hold one or more paid jobs?	☐Yes	See # 5 and 6 in appendix
		If no, go to Point 3.3	□No	
	3.2	Enter the start date of each of your current jobs year/month/day year/month/day year/month/day		
	3.3	Have you temporarily stopped working?	☐ Yes	
		If yes, give the reason.	□No	
		If no, go to Point 3.5		
	3.4	Enter the expected date of your return to work. year/month/day		See # 5 and 7 or 8 in appendix
	3.5	In the last 12 months, have you held another job that ended?	☐ Yes	See # 7 and 8 In appendix
			□No	
	4.	Information on self-employment or the operation of a business		Documents to provide
	4.1	Are you a self-employed worker, owner of a personal business (sole proprietor)	☐ Yes	See # 9, 10 and 11 in appendix
		or of a general partnership?	□No	
If your employment income combined with that of	5.	Information on your other assets and income sources		Documents to provide
your spouse or de facto spouse who is co-signing the	5.1	Do you receive income from the government: income replacement indemnity	☐ Yes	See # 12 in appendix
undertaking with you are insufficient to meet		for a work accident (CSST) or car accident (SAAQ), parental insurance benefits (QPIP), Old Age Security allowances or other?	□No	
the existing scale, you must answer the questions in Section 5	5.2	Do you receive pension income from a private plan?	☐ Yes	See # 12 in appendix
and submit documents that correspond			□No	
to your situation.	5.3	Do you receive support payment (alimony) for yourself or your children?	☐ Yes	See # 13 and 14 in appendix
			□No	
	5.4	Do you own immovable property?	☐ Yes	See #15, 16, 17 and 18 in appendix
	4		□No	
	5.5	Do you receive rental income from a building	☐ Yes	See # 19 in appendix
		that you own or co-own?	□No	
				I a near n
	5.6	Do you have capital invested in investment funds: Registered Retirement Savings Plans (RSSP),	☐ Yes☐ No	See # 20 in appendix

SOURCE OF INCOME AND OTHER ASSETS OF THE CO-SIGNING SPOUSE

If you are the spouse or de facto spouse	> (6.	Information on your employment		Documents to provide	
of the guarantor	6	6.1	Do you currently hold one or more paid jobs?	☐ Yes	See # 5 and 6 in appendix	
and you are co-signing the undertaking, you must			If no, go to Point 6.3	□No		
complete Sections 6 and 7. Only annual income from Canadian sources is taken into account.	6.	6.		Enter the start date of each of your current jobs year/month/day year/month/day		
	(6.3	Have you temporarily stopped working?	□Yes		
			If yes, give the reason.	□No		
	_		If no, go to Point 6.5			
		6.4	Enter the expected date of your return to work. year/month/day		See # 5 and 7 or 8 in appendix	
	(6.5	In the last 12 months, have you held another job that ended?	☐ Yes	See # 7 and 8 In appendix	
				□No		
		7.	Information on self-employment or the operation of a business		Documents to provide	
		7.1	Are you a self-employed worker, owner of a personal business (sole proprietor)	□Yes	See # 9, 10 and 11 in appendix	
			or of a general partnership?	□No		
If you are co-signing the undertaking and	>	8.	Information on your other assets and income sources		Documents to provide	
your employment income combined with that of	8	8.1	Do you receive income from the government:	☐ Yes	See # 12 in appendix	
the guarantor is insufficient to meet the scales in effect, you must answer the questions in Section 8 and provide			income replacement indemnity for a work accident (CSST) or car accident (SAAQ), parental insurance benefits (QPIP), Old Age Security allowances or other?	□No		
the documents required depending on your situation.		8.2	Do you receive pension income from a private plan?	☐ Yes	See # 12 in appendix	
depending on your studion.				\square No		
		8.3	Do you receive support payment (alimony) for yourself or your children?	☐ Yes	See # 13 and 14 in appendix	
	_			□No		
		8.4	Do you own immovable property?	☐ Yes	See #15, 16, 17 and 18 in appendix	
		_		□ No		
4		8.5	Do you receive rental income from a building that you own or co-own?	☐ Yes	See # 19 in appendix	
				□ No		
	6	8.6	Do you have capital invested in investment funds: a Registered Retirement Savings Plan (RSSP),	Yes	See # 20 in appendix	
			Tax-Free Savings Account (TFSA), etc.?	□No		

9. Protection of personal information

The personal information collected on this form, and, where applicable, in any documents that must be appended to it, is necessary to process your application for an undertaking and to implement the Act respecting immigration to Québec, the Regulation respecting the selection of foreign nationals, and their administrative regulations.

The Minister may also use this information for the purpose of studies, statistics and program evaluation, or to convey any information to you that might affect your application.

Your personal information is confidential and may not be released without your consent unless authorized by law. In particular, the law allows personal information to be released without consent under certain conditions where this is necessary to:

- apply an Act in Québec;
- exercise the rights and powers of a Québec or Canadian public body, including Canadian immigration authorities;
- deliver a service of the Ministère or carry out a service contract awarded by the Ministère;
- prosecute an offence against an Act applicable in Québec or because of the urgency of a situation.

Within the Ministère, access to personal information is limited strictly to persons qualified to receive it where such information is necessary for the performance of their duties.

Except in the optional sections, any refusal to answer or any omission may result in the rejection of your application or delay the processing of your file.

You may learn what personal information the Ministère holds about you and, where applicable, present a written request for a correction.

For more information, contact the office that is handling your application. If this office cannot provide the requested information, contact the Ministère's official responsible for the protection of personal information at the Secrétariat général of the Ministère de de l'Immigration, de la Diversité et de l'Inclusion at the following address: Édifice Gérald-Godin, 360 rue McGill, 4th floor, Montréal (Québec), H2Y 2E9.

Read the declaration carefully ► 10. Declaration before signing it. You must send the French form, duly completed and bearing the original signature.

I acknowledge that I have read the notice concerning the protection of personal information in Section 9 of this form.

I understand and accept the following:

- The Ministère may seek confirmation from a third party of the accuracy of the information and documents provided, and that I am committing an offence and am liable to a fine if I give the Ministère, an investigator or inspector any information that I know or should have known to be false or misleading.
- The Ministère may reject any application that contains false or misleading information or documents or an application that does not contain documents deemed relevant.
- The Ministère may refuse to examine an application for an undertaking from a person who, within the past two years, has provided any false or misleading information or documents.
- The Ministère may cancel an undertaking if the application contains false or misleading information or documents, or if the conditions required for its acceptance cease to exist;

I declare that the information provided in this application and any appended documents is accurate and complete.

Signature of guarantor	D	ate
	IJL	
Signature of co-signing spouse	D	ate

Financial capacity evaluation Appendix – Documents to provide

If you do not provide the required documents, your application may be rejected.

We will not return any documents that you submit to us. If necessary, keep copies of original documents requested.

		Compulsory documents	Guarantor	Co-signer
All these documents	1	The original of the Financial Capacity Evaluation form, duly completed and signed		
must be provided by the guarantor and,	2	A copy of all your tax slips (Relevé 1, etc.) from the last income tax year.		
where applicable, by the co-signing spouse.	3	A copy of your Québec personal income tax return for the last income tax year, including all schedules used, for example: Schedule L, Schedule G, TP-80 (Business or Professional Income and Expenses), etc.		
	4	A copy of the Notice of Assessment issued by Revenu Québec for the last income tax year		
		Documents to provide depending on your situation		
If you are currently employed	5	The original of a recent letter from each of your current employers containing the following information:		
		the date employment started and, if applicable, the date employment ended		
		employment status (regular, part-time, seasonal, on-call, etc.)		
		number of hours worked per week		
		your gross annual salary		
		your cumulative gross earning for the current calendar year		
		If you have temporarily stopped work, the letter must also state:		
		the reason and start date of your absence		
		the actual or anticipated date of your return to work		
	6	For each job: a copy of your two (2) last pay slips or two (2) last cashed paycheques (stamped by the bank)		
If you held one or more jobs	7	A copy of:		
that ended in the last 12 months or if you temporarily		• the record of employment issued for employment insurance purposes (if available) or		
stopped working.		• the two latest pay slips or		
		a letter from your previous employer(s) stating the end date of your employment		
		If you stopped work temporarily in the last 12 months, the letter from the employer must also state:		
		the reason and start date of your absence		
	. •	the actual or anticipated date of your return to work		
	8	A copy of the document issued by the Québec government confirming the start and end dates for benefits paid under the Québec Parental Insurance Plan		

			Documents to provide depending on your situation (cont'd)	Guarantor	Co-signe
If you own a company	•	9	A copy of the information return for the Business Register (Schedule 0) or a copy of the registration of your business or the constitution of your company		
	_	10	A copy, if they are available , of the financial statements of your company comparing the last two years of business, signed by an accountant (CA, CGA or CMA)		
		11	The original of a letter signed by an accountant (CA, CGA or CMA) indicating your gross taxable salary solely from income from your company		
	-		Other documents to provide if your employment income is not sufficient		
Income from government	_ >	12	A copy of official and personal documents stating:		
or a private plan			benefits from the Old Age Security pension and any other retirement plan		
			benefits for handicapped children (copy of the benefits slip from Québec paid for a handicapped child)		
			• permanent employment income replacement indemnity (CSST, SAAQ, private plan, etc.)		
			allowances or other permanent government benefits		
Support payment paid	•	13	A copy of all pages of the judgment granting support payment		
to the guarantor or co-signing spouse	_	14	A copy of the last two support payment cheques cashed and stamped by the bank or a document from Revenue Quebec that confirms the collection of your support payment		
Immovable property and rental income	•	15	A copy of your latest municipal or school tax account on which the value of your property is given		
	_	16	A copy of all pages of the notarized agreement to purchase your property		
	_	17	If available, a copy of pages of a report from a certified appraiser, a member in good standing of the Ordre des évaluateurs agrées du Québec, indicating the address of your property and its market value		
	_	18	A document stating the balance of your mortgage:		
			• The original of a letter from your financial institution stating the balance of your mortgage or		
			• a copy of a recent account statement on your mortgage stating the address of the property and the balance of the mortgage		
			or		
	_		the original of a letter from a notary attesting that the property is clear of mortgage		
		19	A copy of the tax return reporting rental income from immovable property: TP-128 (Income and Expenses Respecting the Rental of Immovable Property)		
Financial resources	•	20	The following documents, depending on the case:		
excluding your current accounts			a copy of your most recent account statements (investments, RRSP, TFSA, etc.)		
			• the original of a letter signed by the bank stating the name of the holder, the opening date and balance of your accounts, term deposits, RRSP, TFSA, etc.		
			proof that you hold bonds		
			any other financial document		