

3.7 Personal Net Worth Statement

YOUR PERSONAL FINANCIAL STATEMENT					
Name		Date of Birth		Social Insurance Number	
Street Address		City/Town	Province		Postal Code
Home Phone		Residence Own Rent Other		How long at address? _____years _____months	
Employer's Phone		Married Unmarried Separated <small>(This includes single, divorced, and widowed)</small>		Number of Dependents	
Your Principal Financial Institution and Address:					
PERSONAL DATA ON YOUR SPOUSE					
Spouse's Name			Spouse's Occupation		
Spouse Currently Employed By		How Long with Employer _____years _____months		Spouse's Work Number	
FINANCIAL INFORMATION			AS AT _____		
			Day Month Year		
ASSETS			LIABILITIES		
List and describe all assets			List credit cards, open lines of credit, and other liabilities (including alimony and child support)		
Value			Balance Owing Monthly Payment		
Total Chequing		\$	Bank Loans		\$
Total Savings			Mortgages on Real Estate Owned (see schedule B Below)		
Life Insurance Cash Value			Monthly Rent Payment		
Automobile Make Yr.			Credit Cards (please itemize)		
Stocks and Bonds (see schedule A on reverse)					
Accounts Notes Receivable (please itemize)					
Real Estate (see Schedule B on reverse)			Other Obligations (please itemize)		
Retirement Accounts					
Other Assets (household goods, etc)			Total Monthly Payments		\$
			Total Liabilities (H)		\$
			Net Worth (I-H)		
Total Assets (I)		\$	Sundry Personal Obligations		Please provide details below if you answered Yes to the following question.
Income Sources		Income from alimony, child support, or separate maintenance does not have to be stated unless you want it considered		Are you providing your personal support obligations not listed above (i.e. consigner, endorser, and guarantor?) Yes No	
Your Gross Monthly Salary		\$	Details of any listed above:		
Your Spouse's Gross Monthly Salary		\$			
Net Monthly Rental (from schedule B)					
Other Income (please itemize)					
TOTAL		\$			

SCHEDULE A-STOCKS AND BONDS

Quantity	Description	Where Quoted	Market Value	Pledged As Collateral	
				Yes	No
Total				\$	

SCHEDULE B-REAL ESTATE OWNED

Please Provide information on your share only of real estate owned	Type of Property	Present Market Value	Amount of Mortgages or Liens	Gross Monthly Rental Income	Monthly Mortgage Payments	Monthly Taxes Insur. Maintenance and Misc.	Net Monthly Rental Income
Property Address (Primary Residence) Plan No. Lot No. Street City Province							
Name of Mortgage Holders	First Mortgage			Second Mortgage			
Percentage Ownership	Month Year Acquired:			Purchase Price \$			
Property Address (other) Plan No. Lot No. Street City Province							
Name of Mortgage Holders	First Mortgage			Second Mortgage			
Percentage Ownership	Month Year Acquired:			Purchase Price \$			

GENERAL INFORMATION

Please Provide details if you answer Yes to any of the following questions

Have you ever had an asset repossessed?	Yes	No	Have you ever declared bankruptcy?	Yes	No
Are you party to any claims or lawsuits?	Yes	No	Do you owe any taxes prior to the current year?	Yes	No

Details:

