



## Personal Financial Statement

### Customer Personal Information

First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

DOB \_\_\_\_\_ SIN \_\_\_\_\_

### Contact Information

Home #: \_\_\_\_\_ Cell: \_\_\_\_\_ E-mail \_\_\_\_\_

### Employment Information

Name of Employer \_\_\_\_\_ Job Title \_\_\_\_\_

Address of Employer \_\_\_\_\_ Postal Code \_\_\_\_\_

Length of Time At Employer \_\_\_\_\_ Years \_\_\_\_\_ Months Employer Phone # (780) \_\_\_\_\_

If < Less then 2 years. Indicate previous address \_\_\_\_\_

Income: \$ \_\_\_\_\_ / Year OR \$ \_\_\_\_\_ / Month Credit Consent

### Spouse Personal Information

First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

DOB \_\_\_\_\_ SIN \_\_\_\_\_

### Contact Information

Home #: \_\_\_\_\_ Cell: \_\_\_\_\_ E-mail \_\_\_\_\_

### Spouse Employment Information

Name of Employer \_\_\_\_\_ Job Title \_\_\_\_\_

Address of Employer \_\_\_\_\_ Postal Code \_\_\_\_\_

Length of Time At Employer \_\_\_\_\_ Years \_\_\_\_\_ Months Employer Phone # (780) \_\_\_\_\_

If < Less then 2 years. Indicate previous address \_\_\_\_\_

Income: \$ \_\_\_\_\_ / Year OR \$ \_\_\_\_\_ / Month Credit Consent

### Physical Address

Address \_\_\_\_\_

City \_\_\_\_\_ Postal Code \_\_\_\_\_ Length of time at this address \_\_\_\_\_ OWN/RENT \_\_\_\_\_

If < Less then 2 years, Indicate previous address \_\_\_\_\_

**Assets**

| <b>TYPE/Description</b> | <b>Institution</b> | <b>Asset Value</b> |
|-------------------------|--------------------|--------------------|
| Primary Residence       | _____              | \$ _____           |
| Investment Property     | _____              | \$ _____           |
| Cash On Hand            | _____              | \$ _____           |
| RRSP'S                  | _____              | \$ _____           |
| Mutual Funds            | _____              | \$ _____           |
| Stocks/Bonds            | _____              | \$ _____           |
| Vehicle                 | _____              | \$ _____           |
| Vehicle                 | _____              | \$ _____           |
| Other:                  | _____              | \$ _____           |

**Liabilities**

| <b>Description</b> | <b>Financial Institution</b> | <b>Amount Owing</b> | <b>Description</b>                   | <b>Financial Institution</b> | <b>Amount Owing</b> |
|--------------------|------------------------------|---------------------|--------------------------------------|------------------------------|---------------------|
| Loan               | _____                        | \$ _____            | Mortgage Balance                     | _____                        | \$ _____            |
| Vehicle loan       | _____                        | \$ _____            | Mortgage Payment                     | _____                        | \$ _____            |
| Vehicle loan       | _____                        | \$ _____            | Condo Fees                           | _____                        | \$ _____            |
| Credit Cards       | _____                        | \$ _____            | Property Taxes                       | _____                        | \$ _____            |
| Credit Cards       | _____                        | \$ _____            |                                      |                              |                     |
| Line of Credit     | _____                        | \$ _____            | Monthly Rent Payment (if applicable) |                              | \$ _____            |

The foregoing information is furnished for the purpose of obtaining advances of Alta financial Services Corp. and is hereby certified to be true and correct. I authorize and consent the receipt and exchange of credit information with any credit-reporting agency, credit bureau, or any person or corporation with whom I have or may in the future have financial dealings, and agree that information so received may be retained by you. By completing this application, I understand Alta Financial Services Corp. may use this information to understand my needs and assess my eligibility for products and services that Alta financial Services Corp. believes I may be interest in. I understand that any personal information will be treated accordance with Alta financial Services Corp.'s Privacy Code, available at [www.altafinancial.ca](http://www.altafinancial.ca)

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

Signature: \_\_\_\_\_