



GENERAL INFORMATION

CREDIT UNION NAME AND BRANCH (the "Credit Union")				PURPOSE	
FULL LEGAL NAME				SIN	BIRTHDATE
ADDRESS		HOW LONG?	PREVIOUS ADDRESS		HOW LONG?
MARITAL STATUS	NO. OF DEP. CHILD.	OCCUPATION/POSITION		HOME PHONE	WORK PHONE
EMPLOYER			HOW LONG?	PREVIOUS EMPLOYER	
SPOUSE NAME		OCCUPATION	EMPLOYER	SIN	BIRTHDATE
FINANCIAL INST., BRANCH, ADDRESS, AND A/C NO.				PERSONAL REFERENCE	

FINANCIAL STATEMENT

as at _____ (Schedules on page 2 must be completed.)

ASSETS

Cash: Credit Union \$ _____

Other: _____

RRSPs: Credit Union _____

Other: _____

Stocks, Bonds, & Mutual Funds (Sch. 1) _____

Accounts and Notes: (Sch. 2 & 4) _____

Real Estate: (Sch. 3) _____

Life Insurance (CSV): (Sch. 3) _____

Automobile(s): (Make, Model, Year) _____

Personal & Household Effects: _____

Total Assets (A) \$ _____

LIABILITIES

Loans: Credit Union \$ _____

Other: _____

Mortgages: (Sch.3) _____

Notes & Accounts Payable: (Sch. 5) _____

Taxes Payable: _____

Unpaid Interest: _____

Credit Cards: _____

Other: _____

Total Liabilities (B) \$ _____

NET WORTH (A-B)

ANNUAL EXPENDITURES

Property Taxes & Assessments: \$ _____

Income Taxes: _____

Mortgage or Rent: _____

Loan Payments: _____

Credit Card Payments: _____

Insurance Payments: _____

Estimated Living Expenses: _____

Other: _____

Total Expenditures \$ _____

ANNUAL INCOME

Salary, Wages, & Commissions: \$ _____

Dividends & Interest: _____

Rents (Gross): _____

Business or Professional Income (Net): _____

Other: _____

Total Annual Income: \$ _____

The foregoing information and the information on page 2 and on each schedule is submitted for the purpose of establishing or maintaining credit with the Credit Union and is a true, full, and correct statement of my financial condition as of the date shown.

I hereby authorize the Credit Union to obtain any information it deems necessary about me, including but not confined to, reports from credit bureaus, retail credit companies, or any other source agency the Credit Union deems appropriate.

X

Signature _____

Date _____

GENERAL QUESTIONS (Attach schedules, if necessary.)

Are you a guarantor, co-maker, or endorser on anyone's debt? If yes, provide details.

Do you have any other business connection? If yes, provide details.

Are there any suits or judgments against you? Any pending? If yes, provide details.

Are you now or have you ever been a bankrupt? If yes, provide details.

Have you previously borrowed from other financial institutions? If so, which ones?

Do you have any liabilities under leases for property or equipment leased by you? If yes, provide details.

Are any of your assets mortgaged, pledged, or in any other manner unavailable for payment of your debts? If yes, provide details.

Are any assets presently involved in a marriage or separation agreement? If yes, provide details.

Do you have any personal/business income tax liabilities? What was the date/year of your last income tax return filing?

SCHEDULES**SCHEDULE 1 - STOCKS, BONDS, AND MUTUAL FUNDS**

NO. OF SHARES OR PAR VALUE OF BONDS	DESCRIPTION	REG. IN NAME OF	LISTED	PRICE	MARKET VALUE
TOTAL					\$

SCHEDULE 2 - AGREEMENTS FOR SALE AND MORTGAGES RECEIVABLE

NAME OF PAYER	LOCATION & DESCRIPTION	ORIG. AMOUNT	BALANCE	JOINT TEN.	1ST/2ND	PROPERTY VALUE
TOTAL			\$			

SCHEDULE 3 - REAL ESTATE

LOCATION & DESCRIPTION	*	REG. IN NAME OF	YR. PURCHASED	COST	VALUE	MORT. BAL.	RATE	MO. PMT.	LENDER
TOTAL					\$	\$		\$	

* I = IMPROVED U = UNIMPROVED

SCHEDULE 4 - RECEIVABLES

NAME OF PAYER	AMOUNT	MO. PMT.	FINAL PMT. DUE	COLLATERAL DESCRIPTION, IF SECURED
TOTAL		\$	\$	

SCHEDULE 5 - PAYABLES BY YOU

PAYABLE TO	AMOUNT	MO. PMT.	FINAL PMT. DUE	COLLATERAL DESCRIPTION, IF SECURED
TOTAL		\$	\$	

SCHEDULE 6 - LIFE INSURANCE

FACE AMOUNT	CASH SURRENDER VALUE	BENEFICIARY	ISSUER
TOTAL		\$	