

PERSONAL INFORMATION and STATEMENT OF NET WORTH
 (Complete one form for each shareholder or partner)

Assets		Bank or institution		Amount	
Cash Assets					
Cash					
RRSP					
Stocks/Bonds/Investments					
Other					
Real Estate (owned)	Purchase Year	Physical Address	Owners on Title	Price Paid	Present Value
Vehicles/Machinery /Equipment Owned	Year	Make/Model	Owners on Title	Price Paid	Present Value
				Total Assets	
Liabilities					
Liability	Bank	Purpose		Monthly Payment	Balance Owning
Mortgage					
Line of Credit					
Overdraft					
Vehicle Loan					
Vehicle Loan					
Credit Card					
Credit Card					
Student Loan					
Other					
				Total Liabilities	
				Net Worth (Assets	
				-	
				Liabilities)	

Certification

I certify that all information given in this statement of net worth is true and complete.

I understand that any false information given in this statement of net worth may result in the rejection of this application or immediate demand for repayment of the loan in full, together with any interest accrued thereon.

Full Name:	% Ownership:	Email:	Phone:
Street Address:		City/Town:	Postal Code:
Birth Date (MM/DD/YY):		SIN:	
Do you rent or own your home?		How long at the above address?	

Are you (check all that apply):

- A Canadian Citizen
 Permanent Resident
 Disabled
 Indigenous
 Female
 Youth (18-34)

Current Marital Status (check one):

- Single
 Married
 Common Law
 Separated
 Divorced

Dependents (describe): _____

References:

Name	Relationship	Phone Number

<p>Required Documents</p> <ul style="list-style-type: none"> <input type="checkbox"/> Completed Application Form <input type="checkbox"/> An overview of your business <input type="checkbox"/> A breakdown of the use of funds for the requested loan amount <input type="checkbox"/> 1 year cashflow projections <input type="checkbox"/> 2 years personal tax returns <input type="checkbox"/> 2 years financial statements <input type="checkbox"/> Confirmation of CRA accounts current <input type="checkbox"/> A copy of your resume <input type="checkbox"/> WCB clearance letter (if applicable) <input type="checkbox"/> Copy of business license <input type="checkbox"/> Project invoices / quotes (by request) <input type="checkbox"/> Copy of lease (if applicable) <p>For each partner/shareholder:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Personal Statement of Net Worth <input type="checkbox"/> Copy of driver's license <input type="checkbox"/> SIN, address, contact information <p>Additional information may be required.</p>	<p>Security Documents to be Signed</p> <p>Sole Proprietors & Partnerships</p> <ul style="list-style-type: none"> <input type="checkbox"/> Commitment Letter <input type="checkbox"/> Promissory Note <input type="checkbox"/> CRA Consent Form <input type="checkbox"/> Pre-Authorized Debit Agreement (plus void cheque) <input type="checkbox"/> General Security Agreement <p>Corporate Loans – Documents above <u>plus</u>:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Borrowing Resolution of Directors <p>For each shareholder:</p> <ul style="list-style-type: none"> <input type="checkbox"/> General Security Agreement <input type="checkbox"/> Personal Guarantee
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This Agreement may be executed in several counterparts, and may be delivered by facsimile or by electronic mail in Portable Document Format (PDF), each of which, when so executed, shall be deemed to be an original and such counterparts together shall constitute one and the same instrument and, notwithstanding the date of execution, shall be deemed to bear date as of the date written in the beginning of this Agreement.

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