



# Personal Financial Statement

**Applicant Name**

**Date of Birth**

**Social Insurance Number**



**Present Address and Postal Code**

**Occupancy**

**How Long**




**Previous Address (If less than 2 years at present address, please provide full 2 years history)**

**Email**

**Cell Number**

**Home Phone Number**




**Present Employer**

**Address**

**Telephone**




**Occupation**

**Employed From**

**Employed To**

**Monthly Income**





**Income Type**

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

**Previous Employer Name and Address (If less than 2 years at present employer, please provide full 2 years history)**

**Occupation**

**Employed From**

**Employed To**

**Monthly Income**





**Income Type**

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

**Other sources of Income and Amount**

**Monthly Income**



**Income Type**

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

**Other sources of Income and Amount**

**Monthly Income**



**Income Type**

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

**Have you ever claimed Bankruptcy?**

☐ Yes

☐ No

**If Yes, date discharged:**



# Personal Financial Statement

Co-Applicant Name

Date of Birth

Social Insurance Number



Present Address and Postal Code

Occupancy

How Long




Previous Address (If less than 2 years at present address, please provide full 2 years history)

Email

Cell Number

Home Phone Number




Present Employer

Address

Telephone




Occupation

Employed From

Employed To

Monthly Income





Income Type

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

Previous Employer Name and Address (If less than 2 years at present employer, please provide full 2 years history)

Occupation

Employed From

Employed To

Monthly Income





Income Type

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

Other sources of Income and Amount

Monthly Income



Income Type

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

Other sources of Income and Amount

Monthly Income



Income Type

Select all that apply

☐ Self -Employed

☐ Full-Time Employed

☐ Part-Time Employed

☐ Commission

☐ Bonus

☐ Overtime

Have you ever claimed Bankruptcy?

☐ Yes

☐ No

If Yes, date discharged:



# Personal Financial Statement

## Assets

(Personal - If married, include assets of both self and spouse)

| Cash and Investment | Type | Held at | Name of Financial Institution | Amount  |
|---------------------|------|---------|-------------------------------|---------|
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
|                     |      |         |                               |         |
| Total               |      |         |                               | \$ 0.00 |

Personal Property,  
such as motor  
vehicles, watercraft,  
recreational  
vehicles, and ATV's

| Year (less than 7yrs),<br>Make, Model | Value | Year (less than 7yrs),<br>Make, Model | Value |
|---------------------------------------|-------|---------------------------------------|-------|
|                                       |       |                                       |       |
|                                       |       |                                       |       |
|                                       |       |                                       |       |
|                                       |       |                                       |       |
| Total                                 |       | Total                                 |       |

Real Estate Owned,  
including real  
estate located  
outside of Canada

| Civic Address and/or<br>Legal Description | Real Estate Type | Mortgage<br>Holder (or no<br>mortgage) | Name of Financial<br>Institution | Present<br>Value |
|-------------------------------------------|------------------|----------------------------------------|----------------------------------|------------------|
|                                           |                  |                                        |                                  |                  |
|                                           |                  |                                        |                                  |                  |
|                                           |                  |                                        |                                  |                  |
|                                           |                  |                                        |                                  |                  |
| Total                                     |                  |                                        |                                  |                  |



# Personal Financial Statement

## Liabilities

(Personal - If married, include liabilities of both self and spouse)

| Liabilities | Liability Type | Lender | Balance Owning | Monthly Payment | Security Value |
|-------------|----------------|--------|----------------|-----------------|----------------|
|             |                |        |                |                 |                |
|             |                |        |                |                 |                |
|             |                |        |                |                 |                |
|             |                |        |                |                 |                |
|             |                |        |                |                 |                |
|             |                |        |                |                 |                |

**Total**

| Land Secured Loans, including mortgages and HELOCs | Mortgage or HELOC | Lender | Balance Owning | Monthly Payment | Property Tax | Condo Fees | Maturity |
|----------------------------------------------------|-------------------|--------|----------------|-----------------|--------------|------------|----------|
|                                                    |                   |        |                |                 |              |            |          |
|                                                    |                   |        |                |                 |              |            |          |
|                                                    |                   |        |                |                 |              |            |          |
|                                                    |                   |        |                |                 |              |            |          |
|                                                    |                   |        |                |                 |              |            |          |

**Total**

## Net Worth

Total assets minus total liabilities

|                   |                |
|-------------------|----------------|
| Total Assets      | \$ 0.00        |
| Total Liabilities | \$ 0.00        |
| <b>Net Worth</b>  | <b>\$ 0.00</b> |

The foregoing information is furnished for the purposes of opening accounts, obtaining credit facilities, and obtaining advances from ATB Financial (ATB). I hereby certify all information in this Personal Financial Statement to be true and correct. I authorize and consent to ATB receiving and exchanging personal and 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 ATB. By completing this Personal Financial Statement, I understand ATB may use this information to understand my needs and assess my eligibility for products and services that ATB believes I may be interested in. I understand that any personal information will be treated in accordance with ATB's Privacy Code, available at my local branch or [www.atb.com](http://www.atb.com). This Personal Financial Statement may be executed electronically; this Personal Financial Statement may be delivered by email, facsimile or other functionally-equivalent electronic means.

|                               |                                          |              |
|-------------------------------|------------------------------------------|--------------|
| <b>Applicant's Signature:</b> | <b>Additional Applicant's Signature:</b> | <b>Date:</b> |
|                               |                                          |              |