

# Evaluation of Financial Status

**CONFIDENTIAL**

Name	Social Insurance Number (optional)	Date of Birth											
Ref #	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 12.5%; height: 20px;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> </tr> </table>									<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33.3%; text-align: center;">D</td> <td style="width: 33.3%; text-align: center;">M</td> <td style="width: 33.3%; text-align: center;">Y</td> </tr> </table>	D	M	Y
D	M	Y											
Address		Telephone Number											

Name of Employer
Address
Telephone Number

<b>Income</b>		<b>Expenses</b>	
	Monthly (\$)		Monthly (\$)
Net Wages and Salaries		Rental or mortgage payments on main residence	
Tips		Property Tax if applicable	
Gross Revenue from Self-employment		Food	
Investment - Interest revenue		Clothing	
Welfare (attach proof signed by social worker)		Heating	
Disability Pension		Hydro	
Retirement Pension		Water	
Worker's Compensation Pension		Telephone	
Unemployment Insurance		Cable	
Commissions		Transportation	
Alimony - Support		Health Care - Dental & Drugs	
Family Allowance		- Other (specify)	
Insurance Lump Sum and Periodic Payments		Daycare	
Income Tax or Pension Plan Refund		Insurance Policies on	
Capital Gains		- Car, Dwelling	
Scholarships		Car Loan	
Spouse's Income (net)		Other Payment Arrangements	
Rental Income		Alimony - Support	
Other (specify)		Student Loan(s)	
		Other (specify)	
<b>Total Income</b>	\$	<b>Total Expenses</b>	\$

Assets		Liabilities	
Bank Deposits/Accounts	\$	Credit Cards	\$
Term Deposits		Bank Loans	
Land - Actual Value		Installment Debts (specify)	
- Equity		Mortgages	
House - Actual Value		- House	
- Equity		- Cottage	
Cottage - Actual Value		- Apartment Buildings	
- Equity		- Other	
Car - Actual Value		Credit Companies (specify)	
Truck - Actual Value		Car Loan	
Apartment Buildings - Actual Value		Other Debts to Institutions or	
- Equity		Debts owing to Suppliers	
Stocks - Bonds		Other (specify)	
Registered Retirement Savings Plan			
Other (Specify)			
<b>Total Assets</b>	\$	<b>Total Liabilities</b>	\$

Detail of Liabilities				
Institution	Address	Original Amount	Balance	Monthly Payments

Dependents				
Name	Age	Occupation	Income	Employer