



# PERSONAL NET WORTH STATEMENT

*Please complete one application per applicant.*

Return via email: [victorjh@telus.net](mailto:victorjh@telus.net) or fax: 250-833-0131.

*Incomplete and/or unsigned application will not be processed.*

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## MORTGAGE PURPOSE

Please describe what your lending needs are. For example, is your intention to purchase, refinance, consolidate debt, renew and existing mortgage, private lending, take a 2<sup>nd</sup> mortgage etc.

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## PRODUCT TYPE

Fixed or Variable rate?

For fixed rate, term desired?

Preferred amortization (otherwise 25 years will apply)

Payment frequency:

Accelerated Weekly       Accelerated Bi-Weekly       Semi-Monthly       Monthly

For Refinance, consolidation, renewal, please state amount of mortgage requested \$

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## PERSONAL NET WORTH STATEMENT

If you are married or in a common-law relationship, the asset and liability section may be combined on one application.

Name

Date of Birth

SIN #

Marital Status

Phone

Email

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## Address History

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Please provide a 3 year history of your residential addresses. If you are providing more than 3 addresses, please use an additional application form with only your name and address section filled out.

### Address #1 (most recent/current address)

Physical Address

City

Province

Postal Code

Mailing address if different

Status (Rent/own/ live with parent / other)

How long? Years

Months

Rental amount \$

### Previous Address #2

Physical Address

City

Province

Postal Code

Status (Rent/own/ live with parent / other)

How long? Years

Months

Rental amount \$

### Previous Address #3

Physical Address

City

Province

Postal Code

Status (Rent/own/ live with parent / other)

How long? Years

Months

Rental amount \$

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## Employment

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Please provide a three year employment history.

- If you have had more than 3 jobs in past 3 year period please use the Notes section provided below.
- If you are self-employed or rely on commissions or extensive overtime, for Annual Income fill in the lesser of a two year average or most recent year. Please use NET income pre-tax (line 150 from CRA Notice of Assessment).
- If retired, please include pension income only. Please note dividend income separately. If you have a unique employment/income situation please use the Notes section to detail.

**Employer/Self –Employed (Current/Most Recent)**

Company or Trade Name

Position

Annual Income \$

Time in this position Years Months

Time in this industry Years Months

**Previous Employer/Self-Employed #2**

Company or Trade Name

Position

Annual Income \$

Time in this position Years Months

Time in this industry Years Months

**Previous Employer/Self-Employed #3**

Company or Trade Name

Position

Annual Income \$

Time in this position Years Months

Time in this industry Years Months

Notes:

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**Properties Owned**

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Please use "Property #1" for subject property.

**Fill in items which apply.**

Purchase Price \$

Subject to financing removal date

Down payment amount \$

Source of down payment

Finished square footage

Lot size

Water source (municipal, well)

Sewer type (Sewer, Septic)

Garage

Style (single story, bi-level, two story)

Send an MLS listing form and contract of purchase and sale if available. Minimum down payment is 5%.

**Property #1**

Address

City

Postal Code

Gross Property Tax \$

Estimated Market Value \$

Date purchased

Purchase price \$

Status (principal residence/ rental/ vacation, second residence)

Rental amount (if rented or suited) \$

Mortgage Holder (if applicable)

Balance \$

Payment \$

Term

Rate %

Original amount borrowed \$

Renewal Date

**Property #2**

Address

City

Postal Code

Gross Property Tax \$

Estimated Market Value \$

Date purchased

Purchase price \$

Status (principal residence/ rental/ vacation, second residence)

Rental amount (if rented or suited) \$

Mortgage Holder (if applicable)

Balance \$

Payment \$

Term

Rate %

Original amount borrowed \$

Renewal Date

**Property #3**

Address

City

Postal Code

Gross Property Tax \$

Estimated Market Value \$

Date purchased

Purchase price \$

Status (principal residence/ rental/ vacation, second residence)

Rental amount (if rented or suited) \$

Mortgage Holder (if applicable)

Balance \$



## Liabilities

List all major liabilities. Please note that this does not include phone bills or utilities. Most details will be available to us through your credit bureau so a brief listing of major liabilities is all that is required.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

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## CONSENT

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I/we warrant and confirm that the information given in the mortgage application form is true and correct and I/we understand that it is being used to determine my/our credit responsibility and to evaluate and respond to my/our request for mortgage financing. You are authorized to obtain any information you may require for these purposes from other sources (including, for example, credit bureau) and each source is hereby authorized to provide you with such information. I/we also understand, acknowledge and agree that the information given in the mortgage application form as well as other information you obtain in relation to my credit history may be disclosed to potential mortgage lenders, mortgage insurers, other service providers, organizations providing technological or other support services required in relation to this application and any other parties with whom I/we propose to have a financial relationship.

I/we further acknowledge and agree that each potential mortgage lender, mortgage insurer or service provider to whom you provide the mortgage application and/or my/our personal information is permitted to receive such application and information and maintain records relating to me/us and my/our mortgage application and to hold, use, communicate and is close personal information about me/us, including my/our Social Insurance Number (SIN) if I/we provide it, and collect personal information from me/us, you and from third persons, including credit bureau, credit reporting and collection agencies, financial institutions, my/our past and present employers, creditors and tenants, my/our spouse or any other person who has information about me/us for the purposes of recording, evaluating and responding to my/our application for mortgage financing or related activities and I/we specifically consent to the release and disclosure of personal information by such persons to and among you and each potential mortgage lender, mortgage insurer or other service provider.

DATE

SIGNATURE

(Print and sign or use PDF Digital Signature or DocuSign.ca)