

Personal Financial Statement

Please complete this form for each proprietor, or each shareholder owning 25% or more of voting shares, or any person or entity providing a guarantee to a loan.

A. Personal information								
Birth date	S.I.N.							
City, Province	Postal code How long							
		years months						
Previous address (if current < 2 yrs)	Home phone no.	Business phone no.						
Position	How long	Business year end						
	years mor	nths						
Position	How long	•						
	years mor	nths						
No. of dependents (excluding spouse)	Spouse's name (if appl.)							
Spouse's length of time with employer	Spouse's business phone							
years months								
Spouse previous employer (if < 2 years)	Spouse's date of birth							
	City, Province Previous address (if current < 2 yrs) Position Position No. of dependents (excluding spouse) Spouse's length of time with employer years months	City, Province Postal code How Previous address (if current < 2 yrs) Home phone no. Position How long years mor Position How long years Mor No. of dependents (excluding spouse) Spouse's name (if appl.) Spouse's business phone years months						

Income		Expenses			
	Gross monthly amount		Monthly payment amount		
Salary, wages or commissions	\$	Income taxes	\$		
Business or professional income	\$	Mortgage / rent payments	\$		
Rental income	\$	Strata & maintenance fees	\$		
Other Income (describe) (eg. Dividends, interest, alimony)		Property taxes and assessments	\$		
(1)	\$	Insurance Premiums	\$		
		Heat / hydro	\$		
Spouse's income (if Udd`"L	\$	Personal loans – monthly	\$		
Salary, wages or commissions	\$	Payments other debts (eg. CRA pymt plan for prior years)	\$		
Business or professional income	\$	Other expenses – please itemize			
Rental income	\$	(eg. Alimony, monthly maintenance)			
Other income (describe) (eg. Dividends, interest, alimony)			\$		
(0)			\$		
	\$	Estimated living expenses			
	\$	Loumated living expenses	\$		
Total income	\$	Total expenses	\$		

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C. Personal net worth statement									
Assets				Liabilities					
Asset type	Details (eg. Bank/credit union)		Current	value	Liability type	Current -		outstanding	
Cheq/savings accounts	(cg. barriy crear	t umonj			Credit card(s)	Balance	owing	Authorized limit	
Term deposits/GIC's						Balance	owing	Authorized limit	
Stocks/bonds/mutual funds						Balance	owing	Authorized limit	
RRSP's (savings, terms, stocks, bonds)					RRSP loan(s)				
Automobile (year/make)					Auto loan(s)/lease(s)				
Other assets					Line of credit(s)	Balance	owing	Authorized limit	
(provide brief description)					Line of credit(s)	Balance	Owing	Additionized illillic	
					Personal loan(s) and other liabilities				
Canadian real estate (refer t	o section D)				Mortgage(s) on Canadian real estate (refer to section D)				
	Tot	al assets	\$		Total liabilities	\$			
D. Details for owned Can				provided with	information please note conn	ection to	this stateme	ent and sign.	
			Property		Property B			Property C	
Property type (e.g. residential commercial, raw land)	l,								
Address									
Registered owner(s)									
Percent ownership									
Mortgage holder (bank) & a	ccount no.								
Present market value									
Mortgage balance outstand	ing								
Mortgage payment per mor	nth								
Monthly rental income									
E. Personal declarations									
Have you ever experienced a				yes no					
	Have you ever declared bankruptcy? yes no If yes, when?			_					
	Are you a party to any claims or suits? Do you owe any income tax for years <i>prior</i> to the current year? yes no If yes, note outstanding amount \$								
Signature(s)									
The foregoing information is submitted for the purpose of establishing credit and is a true, full and correct statement of my financial conditions as of the date shown. I/We									
consent to Coast Capital Savings verify credit, employment and c					ation about me/us from credit-rep to credit-reporting agencies.	orting age	ncies, (ii) use s	such information to	
your opinion, either do or could	adversely affect th	e Credit Un	ion's interest, th	en any and all	In the event that such notification outstanding obligations may, at your control of the Credit U	ur election			
I consent to Coast Capital Savings collecting, using and disclosing the personal information in this document pursuant to the terms of the Coast Capital Savings Privacy Policy (a copy of which is available at any branch or online at www.coastcapitalsavings.com)									
Name		Signature		Date					
Name		Signature			Date				

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