

General Information

| | | | |
|-----------------------|-----------------|--|--------------------------|
| Full Legal Name | | Social Insurance Number | Birth Date (dd/mmm/yyyy) |
| Address | City / Province | Postal Code | How Long |
| Previous Address | City / Province | Postal Code | How Long |
| Home Phone | Business Phone | Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed | |
| Employer | | Position | How Long |
| Previous Employer | | Position | How Long |
| Spouse Name | | Social Insurance Number | Birth Date (dd/mmm/yyyy) |
| Financial Institution | Address | | Account Number |
| Personal Reference | | | Phone Number |

Financial Statement

Amounts as at _____ (date) . Schedules on page 2 must be completed.

ASSETS

| | | |
|--|----------------------------------|-----------------|
| Cash | BlueShore Financial Credit Union | \$ _____ |
| | Other | \$ _____ |
| RRSPs | BlueShore Financial Credit Union | \$ _____ |
| | Other | \$ _____ |
| Stocks, Bonds, Mutual Funds (Schedule 1) | | \$ _____ |
| Receivables (Schedule 2) | | \$ _____ |
| Real Estate (Value) (Schedule 3) | | \$ _____ |
| Life Insurance (CSV) (Schedule 5) | | \$ _____ |
| Automobiles (Make, Model, Year) | | \$ _____ |
| | | \$ _____ |
| | | \$ _____ |
| Other | | \$ _____ |
| | | \$ _____ |
| Total Assets (A) | | \$ _____ |

LIABILITIES

| | | |
|------------------------------------|----------------------------------|-----------------|
| Loans | BlueShore Financial Credit Union | \$ _____ |
| | Other | \$ _____ |
| Mortgages (Schedule 3) | | \$ _____ |
| Loans and Other Debts (Schedule 4) | | \$ _____ |
| Taxes Payable | | \$ _____ |
| Unpaid Interest | | \$ _____ |
| Credit Cards | | \$ _____ |
| | | \$ _____ |
| | | \$ _____ |
| Other | | \$ _____ |
| | | \$ _____ |
| | | \$ _____ |
| Total Liabilities (B) | | \$ _____ |

NET WORTH (A-B) \$ _____

ANNUAL INCOME

| | |
|---------------------------------------|-----------------|
| Salary, Wages, & Commissions | \$ _____ |
| Rents (Gross) | \$ _____ |
| Business or Professional Income (Net) | \$ _____ |
| Dividends & Interest | \$ _____ |
| Other | \$ _____ |
| Total Annual Income | \$ _____ |

ANNUAL EXPENDITURES

| | |
|------------------------------|-----------------|
| Property Taxes & Assessments | \$ _____ |
| Income Taxes | \$ _____ |
| Mortgage or Rent | \$ _____ |
| Loan Payments | \$ _____ |
| Credit Card Payments | \$ _____ |
| Insurance Payments | \$ _____ |
| Estimated Living Expenses | \$ _____ |
| Other | \$ _____ |
| Total Expenditures | \$ _____ |

The foregoing information and the information on page 2 and on each schedule is submitted for the purpose of establishing or maintaining credit with BlueShore Financial Credit Union and is a true, full, and correct statement of my financial condition as of the date shown.

I hereby authorize BlueShore Financial Credit Union to obtain any information deemed necessary about me, including but not confined to, reports from credit bureaus, retail credit companies, or any other source agency the Credit Union deems appropriate.

X
Signature _____

Date

General Questions (Attach schedules if necessary)

Are you a guarantor, co-maker, or endorser on anyone's debt? Yes No
If yes, provide details.

Do you have any other business connections? Yes No
If yes, provide details.

Are there any suits or judgments against you? Yes No Any pending? Yes No
If yes, provide details.

Are you now or have you ever been bankrupt? Yes No
If yes, provide details.

Have you previously borrowed from other financial institutions? Yes No
If yes, provide details.

Do you have any liabilities under leases for property or equipment leased by you? Yes No
If yes, provide details.

Are any of your assets mortgaged, pledged, or in any other manner unavailable for payment of your debts? Yes No
If yes, provide details.

Are any assets presently involved in a marriage or separation agreement? Yes No
If yes, provide details.

Do you have any personal / business income tax liabilities? Yes No What was the date / year of your last income tax return filing?

Schedules If you require additional room, please attach separate page.

Schedule 1 – Stocks, Bonds, Mutual Funds

| No. of Shares or Par Value of Bonds | Description | Registered in Name of | Listed | Price | Market Value |
|-------------------------------------|-------------|-----------------------|--------|-------|--------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Total | | | | | \$ |

Schedule 2 – Receivables (other income)

| Name of Payer | Location & Description | Original Amount | Property Value | Joint Tenant | 1st / 2nd | Balance |
|---------------|------------------------|-----------------|----------------|--------------|-----------|-----------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Total | | | | | | \$ |

Schedule 3 – Real Estate

| Location and Description | * | Registered in Name of | Year Purchased | Cost | Lender | Value | Monthly Payment | Rate | Mortgage Balance |
|--------------------------|---|-----------------------|----------------|------|--------|-----------|-----------------|-----------|------------------|
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Total | | | | | | \$ | \$ | \$ | |

* I=Improved U=Unimproved

Schedule 4 – Loans and other Debts

| Payable to | Collateral Description, if secured | Monthly Payment | Final Payment Due | Amount |
|--------------|------------------------------------|-----------------|-------------------|-----------|
| | | | | |
| | | | | |
| Total | | | \$ | \$ |

Schedule 5 – Life Insurance

| Face Amount | Beneficiary | Issuer | Cash Surrender Value (CSV) |
|--------------|-------------|--------|----------------------------|
| | | | |
| | | | |
| Total | | | \$ |

Transfer totals to page 1.