

# PERSONAL STATEMENT OF AFFAIRS

## PERSONAL INFORMATION

First name \_\_\_\_\_

Middle name \_\_\_\_\_

Family name \_\_\_\_\_

Social Insurance number \_\_\_\_\_

Date of birth (m/d/y) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_

Postal Code \_\_\_\_\_ Length of time at that address \_\_\_\_\_

Phone # \_\_\_\_\_ Fax# \_\_\_\_\_ Cell # \_\_\_\_\_

Email Address \_\_\_\_\_

Previous address if less than 2 years

## PERSONAL NET WORTH. PLEASE PROVIDE DETAILS OF YOUR CURRENT PERSONAL FINANCES.

ASSETS	VALUE
Cash on hand	
Cash in the bank	
RRSP & savings	
Family residence	
Other real estate	
Auto & truck	
Model / year _____	
Model / year _____	
Investments	
Recreation vehicles	
Other assets	

TOTAL ASSETS \$ \_\_\_\_\_

LIABILITIES	BALANCE OWING	MONTHLY PAYMENT
Student loan		
Line of credit		
Bank overdraft		
Mortgage balance		
Mortgage balance		
Bank loan		
Credit cards (itemize)		
Credit cards (itemize)		
Credit cards (itemize)		

TOTAL LIABILITIES \$ \_\_\_\_\_

TOTAL NET WORTH \$ \_\_\_\_\_

(Assets minus Liabilities)

PERSONAL BUDGET	MONTHLY
Projected drawings or salary (gross)	
Spousal income	
Other income	

Total Household Income [A] \_\_\_\_\_

Rent or mortgage payment	
Property taxes	
Utilities and phones	
Auto, travel expenses (fuel), maintenance	
Food	
Daycare	
Other expenses, medical, child support	
Current debt payments (excluding mortgage)	
Proposed commercial loan payment	

Total Household Expenses [B] \_\_\_\_\_

**Disposable Income / Surplus [A - B = C]** \_\_\_\_\_

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### PERSONAL INFORMATION

Marital status \_\_\_\_\_ No of dependents, including spouse \_\_\_\_\_

Residence  Own  Rent  Other

Bank or Credit Union \_\_\_\_\_

Address \_\_\_\_\_

### CURRENT EMPLOYMENT INFORMATION

Employer's name and address \_\_\_\_\_

# years \_\_\_ Phone # \_\_\_\_\_ Occupation \_\_\_\_\_

Previous Employer \_\_\_\_\_

# years \_\_\_ Phone # \_\_\_\_\_ Occupation \_\_\_\_\_

### SPOUSAL INFORMATION

First name \_\_\_\_\_ Middle name \_\_\_\_\_

Family name \_\_\_\_\_

Date of Birth (m/d/y) \_\_\_\_\_ Social Insurance # \_\_\_\_\_

Employer's name and address \_\_\_\_\_

# years \_\_\_ Phone # \_\_\_\_\_ Occupation \_\_\_\_\_

### PRIMARY RESIDENCE

Address or legal description \_\_\_\_\_

City / Municipality \_\_\_\_\_ Province \_\_\_\_\_

Title in name of \_\_\_\_\_

Date purchased	
Purchase Price	
Current Market Value	
Mortgage balance owing	
Name of mortgage holder	
Annual Mortgage Payments	

Fire insurance coverage	
Insurance Policy issued by	

### OTHER OBLIGATIONS AMOUNT

	YES/NO	AMOUNT
Are you an endorser, guarantor or co-signer for obligations not listed?		
Does the business owe any back taxes? (i.e. sales tax, income tax, etc.)		
Is the business a party to any claim or lawsuit?		
Has the business ever declared bankruptcy?		

*If you answered "Yes" to any of the above, please provide details:*

\_\_\_\_\_

### INDIVIDUAL LIFE INSURANCE

Life Insurance Company	
Name of Beneficiary	
Policy Value + Type	
Policy Loan(s) Amount	

### DECLARATION

The borrower is:  Metis  Non-status Aboriginal  Inuit

I hereby authorize the Louis Riel Capital Corporation to obtain from and share with persons or organizations, public or private, any information necessary to determine credit worthiness. I certify that all the information provided herein is to the best of my knowledge true, complete and correct and understand that it will be used by the Louis Riel Capital Corporation to determine credit worthiness. The proceeds of the loan applied for will be used for business purposes and not for any personal, family or household purposes.

I hereby grant permission to Indian & Northern Affairs Canada or its successors to have access to related files located at the Louis Riel Capital Corporation for the purpose of reporting, monitoring and evaluating.

*In consideration of the Privacy Act of Manitoba and/or Canada, I hereby irrevocably authorize Louis Riel Capital Corporation to conduct investigations as it deems necessary for the assessment of this and any future loan applications and in the case of loans granted, in the administration and/or collections of such loans, I also authorize Louis Riel Capital Corporation to exchange credit information with other institutions at Louis Riel Capital Corporation's sole discretion and agree that any authorization given by me to another institution does not obligate Louis Riel Capital Corporation to exchange information with said other institution. All information submitted/acquired is the property of LRCC and will remain on file for up to ten (10) years from date of last account activity.*

\_\_\_\_\_  
APPLICANT SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SPOUSE SIGNATURE

\_\_\_\_\_  
DATE