

Page Two CREDIT AND SUPPLEMENTARY PERSONAL INFORMATION

Enter individual applicable answers under each name		
Credit rating description: Excellent - Good or Fair		
Marital status: Married, Divorced, Single or Common Law		
Number of Dependants residing in your domicile		
Have you ever been bankrupt, if so when & discharge date		

Purpose of the Lump Sum

PREVIOUS EMPLOYMENT & ADDRESS DETAILS

If either applicant has been on present job less than 3 years, enter previous job details below:

(1) Applicant - employer/location/number of years.	
(2) Co Applicant - employer/location/number of years	
Income previous employer (1)	Income previous employer (2)
How long residing at present address? (Years)	
Less than 3 years, give full previous address	

PROPERTY DETAILS

Date re-financed since purchase	Re-financed amount
Mortgage payments up to date?	Any liens / judgments?

PERSONAL PRIORITIES

Paying Mtg. - 1st or 2nd priority?	Debt relief: 1st or 2nd priority?
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PROPERTY PARTICULARS

Year property was built	Construction
Detached home	Semi-detached home
Lot size: dimensions in feet	Home size: square footage
No. of Story's	Type of heating
Total rooms in house (all rooms)	Owner occupied (yes or no)
Number of bedrooms	Number of bathrooms
Finished basement	Family room
Garage (Attached or Detached?)	Number of cars? One or two
Town House or Condo	Condo fees (monthly)
Number of fireplaces	Additions made since purchase
Multi-unit or Apt. building.	No. units / apartments
Description of property	Swimming pool

Address mortgaged property

Mortgage previously CMHC insured? If yes provide CMHC reference number, if not enter no.

Is this a rural property? Well & Septic or Serviced?

Type asset	Value of asset	Maturity date if any	Comment on assets
Bank Accounts			
Savings accounts			
RRSP's			
RRSP's			
Term deposits			
Equity funds			
Savings bonds			
Furniture			
Auto (yr/make/Model)			
Auto (yr/make/Model)			

Consultant Phone #: **E-mail address:**

IMPORTANT: an incomplete questionnaire cannot be processed! (Enter notes and comments on the following page)