

# Personal Financial Statement

Business name		Social insurance number (with spaces)	
Surname	First name	Middle name	Birth date (MM/DD/YYYY)
Address		City	
Postal code		Phone number	
Previous Address (previous address required if less than 2 years)		City	
Postal code			
Employer name		Employer address	
Occupation	Business phone number	Years employed	Gross annual income

Only complete spouse information if they are a shareholder in the business

Spouses surname	First name	Middle name	Birth date (MM/DD/YYYY)
Employer name		Business phone number	Occupation
Years employed	Gross annual income	Social insurance number (with spaces)	

Meridian is your primary financial institution:    Yes    No

Note: this is a requirement of this program and will be verified as part of due diligence.

Your business is still in operation as of today's date:    Yes    No

Are you presently a co-signer or guarantor for indebtedness of another party?    Yes    No

If Yes, provide detail:

Have you ever declared personal bankruptcy, or been an owner or director of a corporation that declared bankruptcy?    Yes    No

If Yes, provide detail:

Real estate address	Registered owner	Purchase price	Purchase year	Est. market value	Mortgage holder	Mortgage balance	Annual taxes	Payment P+I+T
				Total (i)			Total (ii)	Total (iii)

Assets	Value	Liabilities	Balance	Monthly payments
Cash (Credit Union / Bank, etc.)		Credit cards		
Non registered investments		Investment loans		
Registered investment		Unpaid income tax		
Life Insurance CSV				
Real estate (Total i above)		Real estate loans (Total ii / iii above)		
Vehicle		Vehicle loans		
Vehicle		Vehicle loans		
Vehicle		Vehicle loans		
Other assets (excluding borrower equity)		Vehicle loans		
		Total A	Total B	<b>Net Worth</b>

I hereby certify that the above statement is accurate and true, to the best of my knowledge, as of the date noted below. I authorize Meridian Credit Union. Limited to obtain factual information on myself, as permitted by law, and to provide other credit granters any credit bureau particulars on this personal financial statement. In addition, I hereby acknowledge notice from the credit union that a consumer report containing my credit information may be referred to in connection with an application for credit or any renewal or extension thereof.

Date: \_\_\_\_\_

By completing and submitting this form to Meridian, you are consenting to Meridian pulling an updated personal beacon score