

**CONFIDENTIAL**

**PERSONAL FINANCIAL INFORMATION**

NAME OF THE APPLICANT \_\_\_\_\_

Assets	<b>Full Value</b>	<b>Annual Income</b>
Cash in banks, trust companies etc.	\$ _____	\$ _____
Investment (stocks, bonds, certificates etc) At approximate value	\$ _____	\$ _____
Life insurance – Face Value _____ Beneficiary _____		
Cash Value of policies	\$ _____	
Real Estate – Market Value _____	\$ _____	
Other Assets (specify) _____	\$ _____	

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

LIABILITIES-Loans, mortgage. \$ \_\_\_\_\_

Other Debts (specify) \$ \_\_\_\_\_

Total Liabilities \$ \_\_\_\_\_

Net Worth \$ \_\_\_\_\_

Government Pension ( OAP, Supplement etc)

Other Pensions (for life? Or for \_\_\_\_\_ years)

Annuities \$ \_\_\_\_\_

**NAME OF THE BANK, BRANCH AND ACCOUNT NUMBERS**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TOTAL INCOME LAST YEAR \$ \_\_\_\_\_

ESTIMATED INCOME THIS YEAR \$ \_\_\_\_\_

Date \_\_\_\_\_ Signed \_\_\_\_\_