

NET WORTH STATEMENT

Name:		Email	
Years at Present Address	Previous address if less than 2 years:		
Mortgage Balance	Mortgagor:		
Date Purchased	Original Purchase Price	Current Value	
Landlord Name/Contact Information (if renting)			
Current Employer	Phone	How long: years	
Occupation	Contact		
Previous Employer if less than 2 years:	Phone	How long: years	
Occupation	Contact		
Spouse:	S.I.N. #	D.O.B.	
Current Employer	Phone/Contact	How long: years	
Occupation	Contact		

Annual Income

Salaries: a) Borrower b) Spouse

Dividends/Interest _____

Rentals _____

Other _____

TOTAL \$

Annual Expenditures

Taxes (Prop. & Pers.) _____

Rent/Mortgage _____

Insurance Premiums _____

Other _____

TOTAL \$

Assets

Cash _____

Term Deposits _____

Bonds/GIC _____

Stocks - current value _____

RRSP's _____

Vehicle _____

Vehicle _____

Real Estate #1 (FMV) _____

Real Estate #2 (FMV) _____

Household Goods _____

Other _____

TOTAL ASSETS \$

Liabilities

Personal Loans _____

Income Tax Payable _____

Credit Cards _____

Vehicle _____

Vehicle _____

Mortgage #1 _____

Mortgage #2 _____

Other _____

TOTAL LIABILITIES \$

NET WORTH (Assets - Liabilities) \$