

PERSONAL FINANCIAL STATEMENT

GENERAL INFORMATION

Name	
Date of Birth	
Civil Status	
Dependant(s)	
Social Insurance No.	
Home Address	
Owner or Tenant	
Previous Address	
Telephone Number – Office	
Telephone Number – Home	
Employer Name	
Type of Job	
Length of Time	_____ years _____ months
Spouse's Name	
Name of Spouse's Employer	
Gross Annual Salary	_____ \$
Other Income (Source)	_____ \$
Spouse's Gross Annual Salary	_____ \$
Total Annual Income	_____ \$
Net Annual Monthly Income	_____ \$

Are there any judgments or legal proceedings against you? ☐ Yes ☐ No

BALANCE AS AT: _____

Assets		Liabilities	
Balance (see item 3)		Demand Loans (see item 7)	
Bank		Bank	
Other Institution		Other Institution	
Term Deposits (see item 3)		Term Loans (see item 7)	
Bank		Bank	
Pension Plan		Other Institution	
Other Institution			
Marketable Securities (See item 4)		Credit Cards (see item 7)	
Accounts Receivable (please itemize)		Accounts Payable (please itemize)	
		Other Obligations	
Surrender Value Life Insurance (See item 5)		Total Liabilities	
Land and Buildings (See item 6)			
Automobile (Year & Model)			
Other Assets (see item 8)		Net Value (Assets less Liabilities)	
Total Assets			

I hereby certify that the above information and the information given below is true, accurate and complete in all respects and faithfully reflects of my financial position as at the balance sheet date.

Signature of insured: _____

Date: _____

Please send the completed, signed and dated application to surety@revau.com.

ITEM 3 - DEPOSIT DETAILS

Institution Name	Account Category	Maturity and Rates	Average Balance	Current Balance

ITEM 4 - NEGOTIABLE SECURITIES (Listed Equities and Bonds)

Par Value or Number of Units	Description	Realizable Value

ITEM 5 - LIFE INSURANCE

Policy Date	Company Name	Beneficiary	Insurance Amount	Annual Premium	Surrender Value	Policy Loans	Net Surrender Value

ITEM 6 - LAND AND BUILDINGS

Description	Owner	Insurance	Municipal Value	Mortgage (Balance)	Gross Income	Market Value

ITEM 7 - LOANS AND CREDIT CARDS

Lender Name	Initial Amount	Credit Limit	Balance

ITEM 8 - OTHER ASSETS

Description	Value