



Personal Financial Statement

This Personal Financial Statement is given by the undersigned, who is applying to be a Personal Guarantor of the Borrower Applicant:

Applicant's Full Name		Date of Birth	Co-Applicant (include applicant's spouse)		Date of Birth
Residence Address			Residence Address <i>(Same as Applicant)</i>		
Email Address		Telephone #			
Business Name			Employed By		
Business Address		Business Telephone #	Employer's Address		Work Telephone #
Time in Business	Industry	Time in Industry	Industry	Position	Length of Employment
Gross Annual Revenues	Annual Remuneration \$		Annual Salary \$		

Statement of Financial Position

Assets	In CAD\$	Liabilities	In CAD\$
Cash on Hand and in Banks		Accounts Payable	
Investments (Schedule B)		Real Estate Mortgages (Schedule A)	
Real Estate (Schedule A)		Unpaid Income Tax	
Accounts Receivable		Credit Cards (Outstanding balance)	
Cash Surrender Value – Life Insurance		Other Liabilities (itemize below):	
Automobiles			
Other Assets (itemize below):			
Total Assets		Total Liabilities	
		Total Net Worth	



Schedules Relative to Assets and Liabilities

(if necessary, attach a supplemental list)

Schedule A - Real Estate

Address	Property Type	Title Holders & %	Purchase Price	Current Value	Mortgage Balance	Monthly Mortgage Payment	Monthly Rental Income

Schedule B - Investments

Type	Where Held	Title in Name of	Market Value

The undersigned hereby authorizes and directs **Halo Advisory (“Halo”)** to act on our behalf as our agents and representatives in the above-noted matter. Halo is authorized to disclose any information belonging to the undersigned for the purpose of the above-noted matter. The undersigned authorizes you to communicate with Halo and its duly authorized agents to complete the above-noted matter. You are hereby authorized to disclose to Halo any information you may have in your files related to the undersigned and the above-noted matter.

This shall constitute your full, sufficient, and irrevocable authority.

Applicant’s Signature	Date	Co-Applicant’s Signature	Date