

**PERSONAL BANKRUPTCY  
APPLICATION  
AND  
INFORMATION SUMMARY**

**NOTE:**

**The Application MUST be completed in detail. All blanks are to be answered. If the answer is not applicable, please use N/A.**

On your initial interview with the Trustee, please bring the following if applicable:

1. Copies of any of your security documents, such as Mortgages, Chattel Mortgages, Conditional Sales Contracts, Lease Contracts, or Financial Statements of any business owned, etc.
2. Any document with regard to any legal actions that you are involved in such as Writs, Judgments, Garnishees, Wage Assignments, Marriage Settlements, Maintenance Enforcement, etc.
3. All of your credit cards and a copy of the last statement received from each credit card company.
4. Copy of the registration for each vehicle owned (Physical check of the serial number if not registered).
5. A copy of your last personal income tax return filed.
6. A copy of your pay stub for your last pay period.

**Exelby & Partners Ltd.**  
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<b>FOR OFFICE USE ONLY</b>	
<b>Date of Assessment:</b>	_____
<b>By:</b>	_____
<b>Assisted:</b>	_____
<b>Sign-Up Date:</b>	_____
<b>Time:</b>	_____
<b>Guideline Amount:</b>	_____
<b>Trustee's Fee:</b>	_____
<b>Excess Income:</b>	_____
<b>First Payment Date:</b>	_____
<b>Could Viable Proposal be filed? Yes / No</b>	_____
<b>If No, Details:</b>	_____

Did you receive any previous financial advice?:

\_\_\_ yes \_\_\_ no

If yes, from who did you receive this advice?:

\_\_\_\_\_

## **REMINDER LIST OF THINGS TO BRING WITH YOU**

When you come to see the Trustee, please bring the following documents:

### **For Identification Purposes**

Driver's License  
Birth Certificate  
Other piece of ID

### **To Provide Proof of Income**

Last Paystub, that shows year-to-date amounts

### **Property/Real Estate Information**

Most recent appraisal of property  
Current Title search

### **Vehicle Information**

Vehicle Registration  
Insurance

### **Income Tax Information**

Copy of previous year's income tax return – or T4 slips if income tax return not filed  
If self-employed then please provide a Summary Statement of  
Income and Expenses from January 1 to the date of the bankruptcy

### **Investment Information**

Copy of RRSP Statement  
Canada Savings Bond Certificate or Statement  
Term Deposit Certificate or Statement  
Stocks Certificates  
Share Certificates  
Profit Sharing Plan Information

### **Credit Cards**

If they have not been destroyed, please bring them all in

### **Payments**

First Monthly Payment  
You can also bring in post dated cheques for subsequent months

### **Summary of all your Current Assets and their value**

### **Monthly Budget – showing all family income and expenses**

### **Any Other Relevant Information relating to your circumstances**

**EXELBY & PARTNERS LTD.**