

ITEMS REQUIRED
PERSONAL PROPOSAL / BANKRUPTCY

A. DEBTORS FINANCIAL INFORMATION

1. **APPLICATION AND BUDGET INFORMATION**

Information Form filled out in full (one form is sufficient for husband and wife; however, you should indicate whether the debts pertain to husband or wife or both).

2. **LEGAL NAME**

We Require Birth Certificate or Citizenship or Passport for all persons filing.

3. Social Insurance Number / Card.

4. Vehicle Ownerships and Insurance / Drivers Licence.

5. a) **REAL ESTATE – owned and sold in last 10 years**

- (i) Deeds for Properties & **Insurance Policy**
- (ii) Mortgage Documents; and/or
- (iii) Power of Sale Notices and Loan Documents;
- (iv) Lawyer's Reporting Statement of Adjustments, when purchased or when sold.

b) **INSURANCE POLICIES** – Copy of Policy, Name of Institution, Account Number

c) **RRSP/GIC/ STOCKS / BONDS** - Statement - Names of Financial Institution & Account Numbers

(d) **RESP** – Current Statement - Name of Financial Institution & Account Number

6. **LEGAL PROCEEDINGS** – Statement of Claim, Judgements, Garnishments, Revenue Canada Demands, Motor Vehicle Accident Claims, Divorce / Separation Agreements

7. **CREDITOR INFORMATION**

- a) Credit Card Statements for last 6 Months
- b) Loans or Credit Cards Guaranteed for another person
- c) Copies of All Loan Agreements – vehicles, equity loans/ lines of credit, real estate mortgages

8. All **CREDIT CARDS** whether active or not

9. **PREVIOUSLY BANKRUPT or FILED CONSUMER PROPOSAL?**: Copy of your file from **the Court** or the Office of the **Superintendent of Bankruptcy**, or your **former Trustee**

TAX INFORMATION

1. **PREVIOUS YEARS:** 3 Years - Personal Income Tax Returns Filed, with Notices of Assessment
NOTE: If you have not yet filed the previous year's return, bring in the income tax information

2. **CURRENT YEAR-TO-DATE:** 2 to 4 Current Pay Stubs
If you are self-employed, a summary of business income and expenses to date should be prepared.

3. **HST** - If you are responsible for remitting HST - ., we require up-to-date returns for the year prior to your visit