



# Personal Worth Statement

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Account Number: \_\_\_\_\_ Phone: \_\_\_\_\_

Assets		Liabilities		
Description	Cash Value	Description	Balance Owing	Payment
Chequing Account		Rent		
Savings				
RRSP's				
Other Investments				
<b>Real Estate</b> (address/legal)		<b>Mortgage</b>		
		Property Tax		
<b>Vehicles</b> (year/make/model)		<b>Loans</b>		
		<b>Credit Cards</b>		
Other		Other		
<b>Total Assets</b>		<b>Total Liabilities</b>		

Statements herein are made for the purpose of obtaining this loan and are true and correct to the best of my knowledge and belief.

Interest rates quoted may be subject to change prior to advancing funds. I hereby authorize the Credit Union to make any inquiries they deem necessary concerning the status of my personal credit.

**Total Assets** \_\_\_\_\_  
**Minus Total Liabilities** - \_\_\_\_\_  
**Net Worth** \_\_\_\_\_

Signature \_\_\_\_\_

Name:	_____
Birthdate:	_____
SIN:	_____
Address:	_____
	_____
Employer:	_____
Length of Employment:	_____
Income:	_____

Signature \_\_\_\_\_

Name:	_____
Birthdate:	_____
SIN:	_____
Address:	_____
	_____
Employer:	_____
Length of Employment:	_____
Income:	_____

# Consent to Purposes Agreement

Acct. #: \_\_\_\_\_

Lakeland Credit Union has adopted a Privacy Code for the protection of member's personal information (referred to below as "information") which is collected, used, or disclosed to others in connection with providing products and services to our members. This code complies with applicable provincial legislation governing the protection of privacy of personal information.

Our Privacy Code requires that members receive disclosure of the purposes for which we collect, use, and disclose your personal information, and that you provide your consent to these purposes.

Our Code also requires that we will get your consent to any new purpose before we use your personal information for that new purpose.

The purposes for which we currently collect, use, or disclose information are as follows:

- To meet regulatory and legal requirements.
- To establish your identification.
- To protect you and us from illegal activity.
- To determine the suitability of products and services to you, and your eligibility for products and services (including determining your eligibility for credit and receiving and exchanging credit information on an ongoing basis with other credit suppliers and credit reporting agencies).
- To operate and administer products and services which you have requested, including providing information to related services providers involved in the operation and administration of those services on behalf of us.
- To provide you with information or advice on products and services that may be of interest to you (whether you currently have a product or service with us).
- To conduct research to assist us in designing products and services, and determining products and services that may be of interest to you, and to obtain your feedback on current products and services.
- To disclose information to third parties in connection with the ongoing management of our assets (including the assignment or sale of loans), and the further subsequent collection, use or disclosure of that information by those third parties and any of their agents or assignees for the purposes of managing those assets.
- To provide ombudsman or mediation services to address concerns with Credit Union products or services raised by you.

In these Purposes a reference to "us, our or we" means the credit union, a reference to "you or your" means the member(s) signing below, a reference to "products and services" means a product or service provided directly by us, or a product or service provided by a related service provider, a reference to a "related service provider" means any organization which we have entered into an agreement with to provide products and services to our members/customers under conditions that protect the privacy of their information.

I/we the undersigned member(s) provide my/our consent to collect, use, and disclose my/our personal information for the purposes disclosed above.

Date: \_\_\_\_\_

Member 1: \_\_\_\_\_ (print name) \_\_\_\_\_

Member 2: \_\_\_\_\_ (print name) \_\_\_\_\_