

Statement of Personal Affairs



1. Personal Information

Last name		First name and Middle name		Date of birth (dd-mm-yyyy)	
Alias (if known by another name now or previously)		Immigration status: ☐ Canadian citizen ☐ Permanent resident ☐ Other			
Marital Status: ☐ Married ☐ Divorced ☐ Single ☐ Separated ☐ Common law		Spouse's name (if applicable)		Number of dependants ☐ Rent ☐ Own ☐ Other	
Current home address		City	Prov./Terr.	Postal code	
Home telephone		Mobile telephone		Email address	

Previous home address(es) within the past 5 years (if less than 5 years at current home address)	City	Prov./Terr.	From (mm-yyyy)	To (mm-yyyy)

Current occupation	Employer name and address	Since (mm-yyyy)	\$ Annual salary
Previous employer's name and address (if less than 3 years at current employer)		Since (mm-yyyy)	\$ Previous annual salary
Spouse's occupation	Spouse's employer name and address	Since (mm-yyyy)	\$ Spouse's annual salary
\$ Total household income from all sources	\$ Monthly mortgage or rent payment	\$ Monthly condo fees	\$ Annual property taxes

2. Personal Assets and Liabilities (including any held jointly with your spouse)

\$ Municipal value of your personal residence (if owned)	Registered owner(s)	\$ Mortgage balance(s) owing	
Municipal value of other real estate you own (rental properties, cottages, etc.)	Street address	Registered owner(s)	Mortgage balance(s) owing
\$			\$
\$			\$
\$			\$

\$ RRSPs (current value)	\$ TFSA (current value)	\$ Marketable investments (stocks, bonds, GICs, etc.)(current value)	\$ Current balance(s) owing on personal credit card(s)
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Unsecured personal debts* (bank loans, line of credit, other liabilities, etc.) *Do not include secured loans such as car loan, boat loan, etc.	Creditor	Monthly payment (principal & interest)	Collateral given as security for the loan	Balance owing
\$		\$		\$
\$		\$		\$
\$		\$		\$
\$		\$		\$
\$		\$		\$
\$		\$		\$

3. Declarations

a) Are you personally liable for debt incurred for the business? ☐ No ☐ Yes

b) Are you an endorser, guarantor or co-signer for any other obligations? ☐ No ☐ Yes (If yes, please provide amount and details.)

c) Do you own shares in any private company other than the entity that has applied to BDC? ☐ No ☐ Yes (If yes, please provide details.)

Corporate name	Address	Activities	Ownership %

d) I hereby declare that I:

- 1) comply with any and all applicable laws and regulations and have all necessary permits to operate the business;
- 2) have no ongoing, pending or threatened claim, action, prosecution or proceeding of any kind before any court, tribunal, government board or agency now underway or looming, and there is no unexecuted judgment rendered against them;
- 3) have not been charged with, pled guilty to, or have been convicted of a criminal offence (excluding a conviction for which a pardon has been granted);
- 4) have not been declared bankrupt under bankruptcy proceedings (discharged or undischarged) and have not been the subject of other insolvency proceedings or proposals.

Clarification regarding statements 1 to 4 above, which cannot be declared true and accurate (attach and initial additional pages if needed):

I acknowledge that BDC will be using this document in relation to one or more loan applications in which I have an interest and certify that the information reported in this document is true, accurate and complete and acknowledge that BDC will be relying on the information. If untrue or inaccurate or incomplete information is provided, BDC may at its discretion decline any application or, if a loan has already been granted, may cease disbursement of funds and demand the full repayment of loans proceeds already disbursed.

I consent for BDC to:

- 1) collect my personal and business information and use such information for business, analytics and marketing purposes as described in the [Policy on confidentiality and use of personal and business information](#) provided or available at [bdc.ca/en/confidentiality](#);
- 2) share my personal and business information with BDC service providers only for them to provide the services BDC asks from them, such as processing credit verification, background checks and other matters explained in the [Policy](#);
- 3) share my personal and business information with authorities in case of fraud or suspected fraud, and with other financial institutions to prevent or control fraud or when I or the business is in breach of a financing agreement with BDC.

BDC may need to change the [Policy](#) in the future. If so, BDC will provide notice of material changes to the [Policy](#), for example, by posting a notice on its website, on my Client Space or sending me an email explaining that the [Policy](#) has been updated.

I am not required by law to consent to the [Policy](#); however, if I decide not to, it may prevent BDC from being able to provide me with a product or service.

Signed this _____ day of _____ 20 _____. Signature: _____

Signatory's name (full name in print format)

This form continues on the next page.

4. Voluntary Self-Identification

The collection of self-identification data is part of BDC's commitment to diversity, equity and inclusion (DEI). You can and should self-identify in all groups that apply to you. This data provides information on the diversity of the population applying for and receiving our products and services. Such data helps us identify potential barriers to access and unconscious biases that need to be addressed.

Completing this self-identification section is entirely optional and will have no consequences on your loan approval application.

a) Do you belong to one of the following groups? *(Select all applicable fields.)*

- ☐ **Women**
- ☐ **LGBTQ2+**

Indigenous¹

- ☐ First Nations
 - ☐ Inuk (Inuit)
 - ☐ Métis
 - ☐ Other (please specify)
-

Visible minority² (Note: for a definition of each category, please consult [Statistics Canada's website.](#))

- | | |
|-----------------------------------|---|
| ☐ Arab | ☐ Latin American |
| ☐ Black | ☐ South Asian |
| ☐ Chinese | ☐ Southeast Asian |
| ☐ Filipino | ☐ West Asian |
| ☐ Japanese | ☐ Other (please specify) |
| ☐ Korean | |
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b) Are you willing to be contacted regarding your selections as it relates to programs or opportunities BDC may offer?

- ☐ Yes, I agree to be contacted.
- ☐ No, I do not wish to be contacted.

¹ Indigenous refers to a person who is First Nations (North American Indian), Inuk (Inuit) or Métis. First Nations includes Status and non-Status Indians.

² A person in a visible minority group is someone (other than an Aboriginal person as defined above) who is non-white in colour/race, regardless of place of birth.