

# ADAMSON & ASSOCIATES INC

*Licensed Insolvency Trustee*

Please check one: Bankruptcy  Consumer Proposal

Terms of the proposal \_\_\_\_\_

## PERSONAL INFORMATION

Last Name	First Name (as shown on birth cert.)	Middle names (as shown on birth cert.)
Social Insurance Number	Date of birth (yy,mm,dd)	Sex ( ) Male ( ) Female
Telephone Number (home)	Telephone Number (work)	Cell Number _____ Email _____
Street Address	City, Province	Postal Code
Date when moved to this address? _____		
If less than 1 year, please list any previous address(es) within the last 2 Years		
Street Address	City, Province	Postal Code
Street Address	City Province	Postal Code
Have you filed a bankruptcy or proposal before? ( ) Yes ( ) No	If "yes", what was the date of discharge? (yy/mm/dd)	Who was the trustee?

## LEVEL OF EDUCATION

( ) 0-8 years	( ) Some high school	( ) University Degree
( ) High school graduate	( ) Post-secondary Certificate or diploma	( ) Some post-secondary

# ADAMSON & ASSOCIATES INC

*Licensed Insolvency Trustee*

## FAMILY INFORMATION

What is your marital status?	<input type="checkbox"/> married <input type="checkbox"/> separated <input type="checkbox"/> divorced <input type="checkbox"/> widow(er) <input type="checkbox"/> common-law <input type="checkbox"/> single	What date did your marital status change? (yy/mm/dd)
Spouses last name	Spouses first name	Spouses middle names
Spouses Social Insurance Number	Spouses date of birth	Sex <input type="checkbox"/> Male <input type="checkbox"/> Female
Has your spouse declared Bankruptcy before? <input type="checkbox"/> Yes <input type="checkbox"/> No	If "yes", what was the date of their discharge? (yy,mm,dd)	
Is your spouse also filing at this time? <span style="float: right;">Yes/No</span> Will this be a joint file (proposal only)? <span style="float: right;">Yes/No</span>		
Is your spouse employed? <input type="checkbox"/> Yes <input type="checkbox"/> No	Spouses position and employer's name	Spouses employers full address
Starting Date? (yy/mm/dd)	Contact name or supervisor	Spouses employer's phone number

## LEVEL OF EDUCATION

<input type="checkbox"/> 0-8 years	<input type="checkbox"/> Some high school	<input type="checkbox"/> University Degree
<input type="checkbox"/> High school graduate	<input type="checkbox"/> Post-secondary Certificate or diploma	<input type="checkbox"/> Some post-secondary

DEPENDANTS - Persons depending on your support financially.

Name continued next page	Relationship to you	Date of Birth (yy/mm/dd)	Expected Income
(1)			
(2)			
(3)			
(4)			
Do these dependants live with you in your home? <input type="checkbox"/> Yes <input type="checkbox"/> No			

# ADAMSON & ASSOCIATES INC

*Licensed Insolvency Trustee*

## EMPLOYMENT INFORMATION

Are you currently employed?  ( ) Yes ( ) No	Employer's Name	Employer's Full Address
Starting Date? (yy/mm/dd)	Contact name or supervisor	Employer's phone number
What is your occupation?		FT/PT
What year did you file you last tax return? _____		Spouse? _____
Did you receive a refund? ( ) Yes ( ) No Spouse ( ) Yes ( ) No		Refund Amount: _____ Spouse: _____
Did you receive EI or social assistance since January this year. (ie. Disability, welfare, etc.)	Since When: _____ If you were receiving assistance, please indicate type:	( ) Yes ( ) No Spouse ( ) Yes ( ) No
Where do you bank? Address? Account balance?		
<b>Note: Please transfer your current bank account to a new bank/account before claiming bankruptcy as it is very difficult to obtain a new account after this decision is made!</b>		

Have you been self-employed or operated a business in the last 5 years? ( ) Yes ( ) No	
Proprietorship _____ Partnership _____ Corporation _____	
Partner name(s) _____	Director names(s) _____
Name of the Business: _____	
Business Address: _____	City, Province: _____
Postal Code: _____	
Nature of Business: _____	
Date started _____	Date closed _____
What percentage of your liabilities were incurred by this business: _____	
Did you have employees in the last year ( ) yes ( ) no	
If yes, please indicate their name, last know address and how much is owed to them on a separate page.	
Please advise of the location of the payroll records: _____	

# ADAMSON & ASSOCIATES INC

*Licensed Insolvency Trustee*

## GENERAL QUESTIONS

If you answer a question "yes", please provide details in space provided

(1) Has anyone co-signed or guaranteed a loan or contract for you?	( ) Yes ( ) No
(2) Are you now or have you ever been "bonded"?	( ) Yes ( ) No
(3) Have you ever received or do you expect to receive an inheritance?	( ) Yes ( ) No
<i>(4) Within the last 12 months, have you (if you answer yes to a – c, please provide details and state whether you knew if you were insolvent at the time of disposition):</i>	
(a) disposed of or transferred any assets or property?	( ) Yes ( ) No
(b) made any "extra" payments to any of your creditors?	( ) Yes ( ) No
(c) had any assets seized (repossessed) by creditors?	( ) Yes ( ) No
<i>(6) Within the last 5 years, have you (if you answered yes to a or b, please provide details and state whether you knew if you were insolvent at the time of disposition):</i>	
(a) sold, disposed of, or transferred any real estate?	( ) Yes ( ) No
(b) made any gifts to relatives in excess of \$500.00	( ) Yes ( ) No
(7) Do you have a safety deposit box?	( ) Yes ( ) No

# ADAMSON & ASSOCIATES INC

*Licensed Insolvency Trustee*

## ASSETS (Things you "own" or lease)

Please describe your assets and property as accurately as possible. If you have pledged the asset as security for a loan, or any creditor holds a mortgage or lien against the property, (ie. the bank may have a lien against your car or house), please provide the name of the person or business that loaned the money under the "Secured Creditor" column. Also, please provide copies of stocks, bonds, RRSP's, life insurance policies, etc.

Asset	Owned by	Estimated Value	Secured Creditor
(1) Cash on hand/Bank			
(2) Stocks and bonds			
(3) Employer Pension Plan (attach statement)			
(4) RRSP's (attach statement)			
(5) Life Insurance (attach policy)			
(6) Personal effects			
(7) Furniture (max. exemption is \$13,500.00)			
(8) "Tools of the trade" (attach list)			
(9) Automobile(s) (including VIN #'s) (Maximum Exemption is \$6,600.00) (i)  (ii)  (iii)			
(10) Other Vehicle(s)  (i)			
(11) House(s) (max. exemption is \$10,000)			
(12) Land			
(13) Other items:			

Do you intend to keep your house? Yes ( ) No ( )

Do you intend to keep your vehicle? Yes ( ) No ( )

# ADAMSON & ASSOCIATES INC

*Licensed Insolvency Trustee*

## LIABILITIES (Amounts you "owe")

Please provide details on your debts (the money you owe) as accurately as possible. If you have pledged any of your assets to any of these creditors, please indicate which asset from the previous page you have pledged to the creditors in the "Security" column.

Creditor's name and <i>full address</i>	Account Number	Amount Owing	Security House, car,
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			

Please attach a separate sheet if you require more spaces

# ADAMSON & ASSOCIATES INC

*Licensed Insolvency Trustee*

## MONTHLY INCOME AND EXPENSES

<b>INCOME</b>	<b>Amount</b>	<b>EXPENSES</b>	<b>Amount</b>
Net take home pay		Child Support Payments	
Spouses net take home pay		Spousal Support Payments	
Net pensions/annuities		Child Care	
Spouses net pensions/annuities		Medical Condition Expenses	
Net Child Support		Fines/Penalties imposed by the Court	
Net Child Tax Benefit		Employment Imposed Expenses	
Net Spousal Support		Rent/Mortgage	
Net EI Benefits		Property Taxes/Condo Fees	
Spouses Net EI Benefits		Heating/Gas/Oil	
Net Social Assistance		Telephone	
Spouses Net Social Assistance		Cable	
Net Self-Employment Income		Hydro	
Spouses Self-Employment Inc.		Water	
Other Income		Smoking	
<b>Total monthly income (A)</b>		Alcohol	
		Dining in Restaurants	
		Entertainment/Sports	
		Gifts/Charitable Donations	
		Prescriptions	
		Food/Grocery	
		Laundry/Dry Cleaning	
		Grooming/Toiletries	
		Clothing	
		Car Lease/Payments	
		Repairs/Maintenance/Gas	
		Public transportation	
		Vehicle Insurance	
		House/Contents Insurance	
		Life Insurance	
		Payments for Secured Creditors	
		<b>To the Estate</b>	
		<b>Total monthly expenses (B)</b>	
<b>Total monthly income (A)</b> _____			
<b>Less: Total monthly Expenses (B)</b> _____			
<b>Net surplus/deficit</b> _____			

**Please tell us how you heard about us (please circle one):**

Bell yellow pages / Phone Guide / Talking yellow pages / Internet / Friends or Family / Lawyer or Accountant /

Credit Counsellor / Other specify \_\_\_\_\_

If you were referred to us, please tell us who referred you, thank you: \_\_\_\_\_

**ADAMSON & ASSOCIATES INC**

*Licensed Insolvency Trustee*

**PRE – BANKRUPTCY EMPLOYMENT  
INFORMATION**

We need to know where you have worked in the current calendar year. Please indicate where you have worked or if you have received EI, social assistance, etc.

Place of Employment And Address	Start Date	End Date

GIVE REASONS FOR YOUR FINANCIAL DIFFICULTY. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**AT THE APPOINTMENT TO SIGN YOUR BANKRUPTCY OR PROPOSAL, YOU  
MUST PROVIDE US WITH THE FOLLOWING ADDITIONAL INFORMATION**

1. Birth certificate, Social Insurance Card or Other valid government identification
2. Copy of a Year-to-date pay stub to file your pre-bankruptcy tax return

\_\_\_\_\_  
Applicant(s) Signature(s)

\_\_\_\_\_  
Date