



**Office use only:**

Bankruptcy:  Summary  Ordinary  
 Proposal:  Consumer  Division I  
 Calgary:  DT  MM  SR  South  
 Edmonton:  DT  NG  South  West  
 Garnishee letter needed  
 Urgent asset follow-up: \_\_\_\_\_

**Papers to be signed:**

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

**Information Form**

Full Legal Name: \_\_\_\_\_

Do creditors know you by any other name? If yes, \_\_\_\_\_

Fax Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Telephone: (home) \_\_\_\_\_ (work) \_\_\_\_\_ ext# \_\_\_\_\_ (cell) \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_ City Province Postal Code

You have resided at this address since: \_\_\_\_/\_\_\_\_/\_\_\_\_ Day/Month/ Year  
 What is the best way to contact you between 8 AM & 5PM?  
 Email  Cell phone  Work phone  Home phone

**Employment Information**

Employed Full-time  Employed Part-time  Not Employed  Self-employed  Retired

Name of Employer: \_\_\_\_\_ Regular Occupation: \_\_\_\_\_

Address of Employer: \_\_\_\_\_

Your work email address: \_\_\_\_\_ Employed/Unemployed since: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Day / Month / Year

**Gender**  Male  Female

**Spousal/Partner Information, if applicable**

Full Legal Name: \_\_\_\_\_

Address (if different from applicant): \_\_\_\_\_

Employed Full-time  Employed Part-time  Not Employed  Self-employed  Retired

Regular occupation: \_\_\_\_\_ Employer name: \_\_\_\_\_

Work phone #: \_\_\_\_\_ (cell) \_\_\_\_\_ Employed/Unemployed since: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Day / Month / Year

**Previous Bankruptcy or Proposal**

Have you been bankrupt before?  Yes  No

Have you filed a proposal before?  Yes  No

If yes for either above, what was the reason for previous filing: \_\_\_\_\_

**Referral Source - Please tell us how you heard of Grant Thornton Alger Inc.?**

YP, specify below

- Which ad: \_\_\_\_\_
- Why ours: \_\_\_\_\_

Money Mentors / Counsellors

- Name: \_\_\_\_\_

Internet

- Bankruptcy Office: \_\_\_\_\_
- www.GT.Alger.ca: \_\_\_\_\_

Shaw Cable / Channel 2

Lawyer

- Name: \_\_\_\_\_

Friend / Previous Bankrupt

Accountant / Trustee

- Name: \_\_\_\_\_

Other (please specify)

- OSB \_\_\_\_\_
- Staff \_\_\_\_\_
- Garbage Can/ Bus Bench  
Where? \_\_\_\_\_
- CRA \_\_\_\_\_
- \_\_\_\_\_
- Why Grant Thornton Alger \_\_\_\_\_



## Monthly Income and Expenses

Income	Monthly	Non-Discretionary Expenses	Monthly
Net employment income		Child support payments	
Net employment income of spouse		Spousal support payments	
Net pensions/annuities		Child care	
Net child/spousal support		Medical condition expenses	
Net child tax /universal child care benefits		Fines/penalties existing at date of bankruptcy	
Net EI benefits/ social assistance		Interest on student loans	
Net self-employment income			
Other income – describe *			
Total monthly income		Total monthly non-discretionary expenses	

Discretionary Expenses	Monthly		Monthly
<b>Housing Expenses</b>		<b>Living Expenses</b>	
Rent/Mortgage(s)		Food/Grocery	
Property taxes/Condo fees		Laundry/Dry Cleaning	
Heating/Gas/Oil		Grooming/Toiletries	
Telephone/Cell		Clothing	
Cable/Internet		Bank Charges/Newspaper	
Other Utilities		Other –	
Home Maintenance		<b>Transportation Expenses</b>	
Other –		Car Lease/Payments	
		Repair/Maintenance/Gas	
<b>Personal Expenses</b>		Public Transportation	
Smoking		Other –	
Alcohol		<b>Insurance Expenses</b>	
Lunches/Beverages/Snacks		Vehicle	
Entertainment/Sports		House	
Gifts/Charitable Donations		Furniture/Contents	
Allowances		Life Insurance	
Education		Other –	
Other –		<b>Payments</b>	
<b>Non-recoverable Medical Expenses</b>		To the Trustee	
Prescriptions		To secured creditor	
Dental/Optical		Other –	
Blue Cross			
Other –			
		Total Monthly Discretionary Expenses	

If you are unemployed, or your expenses exceed your income, how are your living expenses being covered?

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\* Such as amounts received as damages for wrongful dismissal, as pay equity settlements or that relate to workers' compensation

**Assets (What you own?)**

	Value	Exempt (Trustee use)
• Cash on hand?	\$ _____	_____
• Are you maintaining any bank accounts at present? Where? _____ Are any of your accounts joint? If so, with whom _____	\$ _____ \$ _____	_____ _____
• Resale value Household furnishings and appliances? – Please complete list below	\$ _____	_____
• Clothing and personal effects (garage sale or second-hand store value only)?	\$ _____	_____
• Does anyone owe you money? _____	\$ _____	_____
• Life insurance policies _____	\$ _____	_____
• Investments (RRSP, Employee Profit Sharing Plan, GIC, Mutual funds, Stocks and Shares and Canada Savings Bonds) Describe _____	\$ _____ \$ _____	_____ _____
• Registered Education Savings Plan (RESP) _____	\$ _____	_____
• Co-op Membership Number _____	\$ _____	_____
• Real estate – record address _____	\$ _____	_____
• Vehicles/Recreational(including cars, trucks, boats, campers, trailers, snow machines, etc) Make & Model: _____ Year: _____ Serial Number: _____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
• Personal property used to earn income (tools of trade) Describe _____	\$ _____	_____
• Other assets (including any asset you may have paid over \$1,000.00 for or insure separately under your insurance policy) Describe _____	\$ _____ \$ _____	_____ _____

**Furniture/Appliances**

*(Please check items you presently have in your possession. Estimated value is calculated as if sold at an auction or garage sale today)*

#	Item	Value	#	Item	Value	#	Item	Value
	Stove/Oven			Desk/chairs			Sculptures	
	Fridge			Cedar Chest			Antiques	
	Dishwasher			Dining Room suite			Paintings	
	Microwave			China Cabinet/Hutch			China/Crystal	
	Kitchen set			Area Rug			Silver/Silverware	
	Sofa/Loveseat			Freezer			Pool Table	
	Armchair			Washer			Shop Tools	
	Recliner			Dryer			Air Conditioner	
	Coffee/End Table			Piano/Organ			BBQ	
	Entertainment Ctr.			Other musical instrum.			Snow Blower	
	Vacuum			DVD/VCR			Lawn Mower	
	Book Case			Stereo/Speaker			Patio Furniture	
	Bed			Other electronics			Hot Tub/Pool	
	Dresser/Highboy			Television			Bicycle	
	Night Table			Computer			Exercise equipment	
	Bedroom suite			Printer/Scanner/Fax			Other	
	Sewing machine			Jewellery				

Total Estimated Resale Value: \$ \_\_\_\_\_