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**PERSONAL LOAN APPLICATION – MAX \$500**

Please complete the entire form and mail, deliver, or email.

**Section 1: Applicant Information**

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Are you Jewish? Yes  No

(JFLA can only offer loans to members of the Edmonton Jewish community.)

Describe your involvement in the Edmonton Jewish community.

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Date of birth (DD/MM/YY) \_\_\_\_\_ Country of Birth \_\_\_\_\_

Citizenship status: Canadian Citizen \_\_\_\_\_ Permanent Resident \_\_\_\_\_  
 Convention Refugee \_\_\_\_\_

What other countries have you lived in? \_\_\_\_\_  
 \_\_\_\_\_

What year did you arrive in Canada? \_\_\_\_\_

What are the names and ages of your dependents?

\_\_\_\_\_  
 \_\_\_\_\_

**Section 2: Contact Information**

Cell Phone Number \_\_\_\_\_ Alternative Phone Number \_\_\_\_\_

Email \_\_\_\_\_

**Section 3: Housing Information**

Street Address \_\_\_\_\_ City \_\_\_\_\_

Postal Code \_\_\_\_\_

Do you own or rent this home? \_\_\_\_\_

Number of years at this address \_\_\_\_\_ Number of years in Edmonton \_\_\_\_\_

**Section 4: Employment Information**

Current Occupation \_\_\_\_\_

Name of Current Employer \_\_\_\_\_

Work Address \_\_\_\_\_ City \_\_\_\_\_

Postal Code \_\_\_\_\_

Work Phone Number \_\_\_\_\_ How long in this job? \_\_\_\_\_

Gross Annual Income \_\_\_\_\_ Net Annual Income \_\_\_\_\_

**Section 5: Spouse/Partner's Information**

Marital Status:

Single  Married  Divorced  Separated  Widow(er)   
Common-Law

Spouse/Partner's last name \_\_\_\_\_ First Name \_\_\_\_\_

Spouse/Partner's occupation \_\_\_\_\_

Net Monthly Salary \$ \_\_\_\_\_

Company of Employment \_\_\_\_\_

Position \_\_\_\_\_

How long in this job? \_\_\_\_\_ Phone Number \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_

Postal Code \_\_\_\_\_

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**Section 6: Loan Request**

How much would you like to borrow? \$ \_\_\_\_\_

What specifically will you use the loan funds for? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are you currently a client of Jewish Family Services of Edmonton?

Yes  No

Have you ever applied for loan with the JFLA?

Yes  No

Have you ever served as a Guarantor with the JFLA?

Yes  No

### **Section 7: Financial Summary**

Specify type and monthly amount of other sources of income: e.g. Social Assistance, Pension, Welfare, Spousal Support, Child Support

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### **HOUSING**

Monthly Rent \$ \_\_\_\_\_

Home Purchase Price \$ \_\_\_\_\_

Year Purchased \_\_\_\_\_

Mortgage Owning \$ \_\_\_\_\_

Which Institution? \_\_\_\_\_

Monthly Mortgage \$ \_\_\_\_\_

Annual Taxes \$ \_\_\_\_\_

Monthly Condo Fees \$ \_\_\_\_\_

### **CAR/TRANSPORTATION**

Vehicle 1 (Make/Model) \_\_\_\_\_

Year \_\_\_\_\_

Owing \$ \_\_\_\_\_ Monthly Payments \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

With which financial institution? \_\_\_\_\_

Vehicle 2 (Make/Model) \_\_\_\_\_

Year \_\_\_\_\_

Owing \$ \_\_\_\_\_ Monthly Payments \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

With which financial institution? \_\_\_\_\_

**CASH/INVESTMENTS/LOANS/DEBTS**

Cash & Investment Assets: e.g. cash, investments, vacation property

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Other Assets:

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Assets in Other Countries: include all details

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Student Loan Amount Owing: \$ \_\_\_\_\_

Monthly payments: \_\_\_\_\_

Line of Credit Amount Owing: \$ \_\_\_\_\_

Monthly payments: \_\_\_\_\_

Credit Card 1 Amount Owing \$ \_\_\_\_\_

Monthly payments: \_\_\_\_\_

Credit Card 2 Amount Owing \$ \_\_\_\_\_

Monthly payments: \_\_\_\_\_

Other Loans or Debts (specify) \_\_\_\_\_

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**BANKING DETAILS**

Who do you bank with?

Bank Name \_\_\_\_\_

Branch Location \_\_\_\_\_

**Section 8: Acknowledgement & Declaration**

Please review the following and initial each box if you agree:

The attached Applicant's Budget is true and correct.

I declare that the information provided in this application is true and correct.

I acknowledge and agree that the personal information collected from me may be disclosed to the employees and volunteers involved in the loan decision process, to persons retained by the JFLA to administer the loan, and to persons deemed necessary by the JFLA for the provisions or enforcement of the loan.

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Witness (print name): \_\_\_\_\_

Signature: \_\_\_\_\_

DATE: \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_  
(day) (month) (year)



## APPLICANT'S BUDGET

### Monthly Income and Expenses

#### INCOME

Employment income (after deductions)	
Income from tenant	
CPP or other benefits	
Other income sources	
Total monthly income	

#### EXPENSES

Rent/Mortgage	
Property Taxes	
Hydro	
Gas	
Telephone	
Cell phone	
Gasoline	
Car payments	
Auto maintenance	
Home insurance	
Cable/internet	
Food (groceries, restaurants)	
Clothing	
Incidentals	
Childcare	
School Tuition (for dependents and self)	
Health/life insurance	
Pets	
Student loan payments	
Line of Credit payments	
Credit card 1	
Credit card 2	
Credit card 3	
Other loans (friends/family etc.)	
Other expenses (e.g. trips)	

Total	
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