

Application for the Evaluation of a Financial Situation

Complete this form if Revenu Québec has requested a statement of your financial situation.

Send the form, duly completed and signed, to the address provided by your Revenu Québec contact person.

1 Information on the applicant (please print)

Last name and first name		Social insurance number			
Address		Postal code	Area code	Telephone	Extension
Name of authorized representative (if applicable)		Title			

2 Income and assets

2.1 Monthly family income

Enter the total monthly amounts you and your spouse receive. If you only know your annual income, divide that amount by 12.

Your net salary and wages (including commissions and tips). Attach your pay slips.			1
Your spouse's net salary and wages	+		2
Bonuses and overtime	+		3
Net business income	+		4
Net rental income	+		5
Support payments	+		6
Pensions and annuities	+		7
Income from investments, dividends, interest, etc.	+		8
Benefits and compensation (for example, employment insurance, CSST, SAAQ, RRQ or child assistance payment)	+		9
Other income (for example, wage loss replacement benefits). Specify:	+		10
Add lines 1 through 10.		Monthly family income =	11

2.2 Family assets

Take into account the sums and property that you and your spouse possess when you complete the work chart below. In addition to the assets mentioned in the work chart, include the following assets under "Other": your investments (for example, mutual funds), your immovables (for example, land or a secondary residence) and your movable property (for example, furniture, a boat or a tent trailer). **If you are an individual in business, attach the applicable financial statements.**

Family assets	Location and other information	Year of purchase	Date of maturity	Actual value or market value*	
Bank accounts, term deposits					12
Shares, bonds, other				+	13
RRSP or RRIF				+	14
Vehicles				+	15
Recreational vehicles (for example, a trailer or a motorcycle)				+	16
Principal residence				+	17
Cottage				+	18
Land				+	19
Rental property				+	20
Life insurance and cash surrender value				+	21
Authorized lines of credit				+	22
Other (specify):				+	23
Add lines 12 through 23.				Family assets =	24

* Market value is the amount you would expect to obtain from the sale of a property.

3 Expenses and debts

3.1 Monthly expenses

Enter your **monthly** family expenses.

Number of adults in your home: _____ Number of dependent children: _____

If you only know the annual amounts, divide them by 12.

Rent (if you are a homeowner, see section 3.2)

Municipal and school taxes	+		25
Electricity and heating (for arrears, see section 3.2)	+		26
Telephone, Internet, and cable TV (for arrears, see section 3.2)	+		27
Food	+		28
Clothing	+		29
Personal property insurance (for example, home or car)	+		30
Life and disability insurance (other than that included in a group insurance contract)	+		31
Car rental (for arrears, see section 3.2)	+		32
Car expenses (for example, gasoline, maintenance, registration or licence)	+		33
Transportation (for example, bus, metro or taxi)	+		34
Child-care expenses, school expenses and tuition fees	+		35
Current support payments (for arrears, see section 3.2)	+		36
Medical expenses or expenses for health services and uninsured prescription drugs	+		37
Recreation and personal care	+		38
Miscellaneous (specify):	+		39
Add lines 25 through 40.		Monthly expenses	= 40
			41

3.2 Monthly debt payments

Enter the names and addresses of your creditors, the balance of your family's debts and the due dates and amounts of your **monthly** payments.

Debt	Name and address of creditor	Balance of debt	Due date			Monthly payment
			Y	M	D	
Mortgage on principal residence		42a	_	_	_	42
Other mortgages		43a	_	_	_	43
Car loan		44a	_	_	_	44
Other loans: personal, student, etc.		45a	_	_	_	45
		46a	_	_	_	46
Lines of credit used		47a	_	_	_	47
		48a	_	_	_	48
Credit cards		49a	_	_	_	49
		50a	_	_	_	50
		51a	_	_	_	51
Support payments		52a	_	_	_	52
Federal income tax		53a	_	_	_	53
Electricity and heating		54a	_	_	_	54
Telephone, Internet, and cable TV		55a	_	_	_	55
		56a	_	_	_	56
Other debts (specify):		57a	_	_	_	57
		58a	_	_	_	58
Add lines 42a through 58a.		Total debts				= 59
Add lines 42 through 58.						Total monthly debt payments
Amount from line 41						= 60
Add lines 59 and 60.						Total monthly expenses and monthly debt payments
						= 61
Amount from line 11						62
Amount from line 61						- 63
Subtract line 63 from line 62.						Budget surplus or deficit
						= 64

4 Certification

If you are an authorized representative and have never filed form MR-69-V, *Power of Attorney, Authorization to Communicate Information, or Revocation*, enclose it with this form.

I certify that the information provided in this form is accurate and complete.

Name of applicant or authorized representative

Title (if applicable)

Signature of applicant or authorized representative

Date

Area code

Telephone

Extension