

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

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)					25
Municipal and school taxes	+				26
Electricity and heating (for arrears, see section 3.2)	+				27
Telephone, Internet, and cable TV (for arrears, see section 3.2)	+				28
Food	+				29
Clothing	+				30
Personal property insurance (for example, home or car)	+				31
Life and disability insurance (other than that included in a group insurance contract)	+				32
Car rental (for arrears, see section 3.2)	+				33
Car expenses (for example, gasoline, maintenance, registration or licence)	+				34
Transportation (for example, bus, metro or taxi)	+				35
Child-care expenses, school expenses and tuition fees	+				36
Current support payments (for arrears, see section 3.2)	+				37
Medical expenses or expenses for health services and uninsured prescription drugs	+				38
Recreation and personal care	+				39
Miscellaneous (specify):	+				40
Add lines 25 through 40.				Monthly expenses	= 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
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	=	59a	
Add lines 42 through 58.			Total monthly debt payments	= 59
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