



City of Kawartha Lakes  
Human Services  
Box 2600, 68 Lindsay Street North  
Lindsay, ON K9V 4S7  
705-324-9870  
cklhumanservices@kawarthalakes.ca

## Investment Verification Form - HP102

### Instructions for completion:

- The following form is required to be completed to verify eligibility for rent-geared-to income assistance (if the applicant has investments).
- All investments/accounts/assets must be declared for each household member, including assets that are jointly owned with others outside of your household.
- Investment/accounts/assets may include but are not limited to: chequing/savings accounts, RRSP, TFSA, GIC, Annuity, LIRA, LIF, overseas or foreign investments, cash value of a life insurance policy, trust account, or any other income source or asset held by a member of the household.
- A recently printed "Banking Profile" from all of your Financial Institutions that shows the value of all of your accounts and investments, or alternatively the Declaration of Assets Form (HP101). Note: the Declaration of Assets Form must be completed and signed by a representative from the financial institution where the income sources / assets / investments are held. Submit separate forms for investments, Investment Verification Form (HP102) held at different institutions (where applicable).
- All assets must be declared and verified as to whether they are cashable or noncashable, and the date the term expires, in the case of a term investment. This form may be required to be completed annually.
- Attach further documentaion if more space is required.

**Applicant/Tenant Last Name: \***

**Applicant/Tenant First Name: \***

**Birth Date  
(MM/DD/YY) \***

**Gender Identity**

**Home phone:**

**Applicant SIN #:**

**Co-applicant/Tenant Last Name: \***

**Co-applicant/Tenant First Name: \***

**Co-applicant/Tenant  
Birth Date  
(MM/DD/YY) \***

**Gender Identity**

**Co-applicant/Tenant  
SIN #:**

**Relationship to  
Applicant/Tenant:**

**Mailing Address (Street, PO Box, City, Province, Postal Code):**

**Email:**

**To be completed by Financial Institution**

- List Investment type (e.g. RRSP, TFSA, LIF, GIC, Term Annuity)
- Account number
- Value as of Today's Date
- State ALL listed questions for each investment.

**1. Investment Type**

**Account number:**

**Value as of today's date:**

**Is this investment/account cashable?**

**If the investment is locked-in for a specific  
time period, indicate the date at which it can  
be cashed:**

**If the investment is locked-in, under what  
circumstances can it be unlocked?**

**Include the date the investment was locked-in:**

**Any other information or statement to indicate if and when the investment/account is cashable:**

**2. Investment Type****Account number:****Value as of today's date:****Is this investment/account cashable?****If the investment is locked-in for a specific time period, indicate the date at which it can be cashed:****If the investment is locked-in, under what circumstances can it be unlocked?****Include the date the investment was locked-in:****Any other information or statement to indicate if and when the investment/account is cashable:****3. Investment Type****Account number:****Value as of today's date:****Is this investment/account cashable?****If the investment is locked-in for a specific time period, indicate the date at which it can be cashed:****If the investment is locked-in, under what circumstances can it be unlocked?****Include the date the investment was locked-in:**

**Any other information or statement to indicate if and when the investment/account is cashable:**

**4. Investment Type**

**Account number:**

**Value as of today's date:**

**Is this investment/account cashable?**

**If the investment is locked-in for a specific time period, indicate the date at which it can be cashed:**

**If the investment is locked-in, under what circumstances can it be unlocked?**

**Include the date the investment was locked-in:**

**Any other information or statement to indicate if and when the investment/account is cashable:**

**5. Investment Type**

**Account number:**

**Value as of today's date:**

**Is this investment/account cashable?**

**If the investment is locked-in for a specific time period, indicate the date at which it can be cashed:**

**If the investment is locked-in, under what circumstances can it be unlocked?**

**Include the date the investment was locked-in:**

Any other information or statement to indicate if and when the investment/account is cashable:

Name of staff completing this form

Date (MM/DD/YY) \*

Signature of staff completing this form

Financial Institution

Contact Information: Phone:

Contact Information: Email:

## Consent to Disclose and Verify Information

Specifically, I/we consent to the information in this Investment Verification Form and any supporting documentation, to be given, without further notice, to the City of Kawartha Lakes Human Services, if the information is necessary for the purpose of making decisions or determining eligibility for Affordable Housing, Housing Allowance, or rent-geared-to-income assistance under the Housing Services Act, 2011.

Applicant/Tenant Signature

Date (MM/DD/YYYY) \*

Co-applicant/Co-tenant Signature

Date (MM/DD/YYYY) \*

### Notice with Respect to the Collection of Personal Information

Personal information provided in this consent and through email messages between applicants and/or tenants and authorized representatives of the City of Kawartha Lakes is collected and used in accordance with the provisions of the Municipal Freedom of Information and Protection of Privacy Act, or as otherwise required or permitted by law. This consent applies to information shared in the form of electronic data exchanges for the delivery of housing programs.

Visit our website for further building information:

[www.kawarthalakes.ca](http://www.kawarthalakes.ca)