

2022 Equipment Finance Activity Survey Instructions

Thank you for participating in this year's edition of the most important source of statistical information on the equipment leasing and financing industry in Canada. Below, please find instructions on how to complete your survey.

How will my information be kept confidential?

Your information will be handled strictly confidential by KPMG and Equifax. No individual lender's answers will be shared as part of the final report, and aggregated results will only be shown for segments and questions where enough lenders have provided answers.

What is the deadline for completing the survey?

Please complete and return the survey by **Friday, 24 June 2022**, end of day.

To whom do I send the completed survey?

Please send the completed survey directly to [Irina Bon-Rainesh](#) at KPMG.

We are a multinational company. What information do I provide?

The financial information should be provided only for your Canadian member firm and not the member parent company. Only obligations secured by commercial equipment assets should be included in the survey – do not include real estate and leases for household/consumer

What else should I consider when completing the survey?

- Approximate estimates (within a few percentage points on segment dollars, a few basis points on percentage metrics, a few hours on time metrics, etc.) are acceptable
- For questions requesting dollar amounts by various segments, summed values of all segments should equal overall portfolio balance or originations volume, respectively
- Any currency figures should be in Canadian dollars and provided in thousands of dollars. Please exclude all non-numeric characters like "\$" or commas from responses
- For all percentage figures relating to delinquency and charge-off, please round to the nearest basis point or hundredth of a percent
- For metrics relating to approval/conversion rates, please round to the nearest percent
- Additionally, please enter all percentages as whole numbers and exclude any commas or "%" signs (i.e. 1.31% should be entered as 1.31)
- For questions relating both portfolio balance and delinquency, please try to only include active and open accounts and exclude accounts aged over 180 days past due or closed

What if I can't respond to every question?

Please respond to as many questions as possible; partially completed responses are acceptable. Only lenders that provide the majority of answers will receive the full final report.

Who do I contact if I have additional questions?

Please contact [Joshua Farrington](#) at Equifax for any questions or comments on the survey.