

CASH FLOW / BUDGET ANALYSIS

CURRENT GROSS INCOME (ANNUAL)

	CLIENT	SPOUSE	JOINT
Salary / Wages			
Self-Employment Income			
Company Pension			
CPP			
OAS			
Interest Income			
Dividend Income			
Annuity/RRIF Income			
Other			
Other			
TOTAL INCOME			

CURRENT EXPENSES (ANNUAL)

	CLIENT	SPOUSE	JOINT
Rent / Mortgage			
Property Taxes			
Income Taxes			
Utilities			
Transportation			
Insurance (life, group, auto, home)			
Food / Groceries			
Clothing			
Trips / Vacations			
Recreation			
Savings Deposits			
RRSP Deposits			
Childcare			
Loan / Credit Payments			
Gifts			
Miscellaneous			
Miscellaneous			
TOTAL EXPENSES			
NET INCOME			

What's important to you?

