

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?

