APPLICATION APPLICATION	ON FORM	Counsellor					
Credit Counselling	g Services of Peterbo	File #					
540 George St. N Peterborough, ON		Date					
Phone: 705-743-2	2272 Fax: 705 742-28						
www.ccrc-ptbo.co	m	Referral Source					
CLIENT #1 SURNAM	ME (print)	First Name & Initial					
Date of Birth		A.K.A.					
CLIENT #2 SURNAM	νΕ: (print)	First Name & Initial					
Date of Birth			A.K.A.				
Address			Postal Code	How long there?			
	MARITAL STATUS		OCCUPANCY STATUS	Home Phone #			
Single	Widowed		Own				
Common Law	Married		Rent				
Separated	Divorced		Board				
Client #1 Employer			Occupation	Business Phone #			
Client #1 Employer's Address		Gross Income Monthly	Gross Income Annual	How long there?			
		i monany		Pay period:			
Client #2 Employer			Occupation	Business Phone #			
Client #2 Employer's	Address	Gross Income Monthly	Gross Income Annual	How long there?			
-		Working		Pay Period			
OTHER FAMILY	Name:	Relationship	Date of Birth C	ccupation			
MEMBERS							
RESIDING IN HOUSEHOLD							
TIOUSLITULD							
Education	Who?	Where / When?	•				
Previous Credit	Who?	Where / When?					
Counselling		Timere / Timeri					
Previous Bankruptcy	Who?	Where / When?					
Other Agencies	Who?	Where / When?					
Involved COMMENTS:							
			CASE CATEGORY	Now			
		Counselling Third Party	New Re-Open				
			DMP	Reassess			

File # ASSETS, NET WORTH & INCOME Client Counsellor Copy Received Credit Counselling Services of Peterborough **ASSETTS & NET WORTH** Date Real Estate - Location % Cost Price \$ Current Value Year Purchased Due Date Less 1st Less Mortgages Held by 1st Due Date Less 2nd 2nd Due Date Less 3rd 3rd \$ Value of Equity in Real Estate Vehicle - Year **Current Value:** Make Vehicle - Year Make Value of Household Goods Circle Appropriate: motorcycle, boat, motor, camper, trailer, sporting equipment, skidoo, ATV, dirt bike, mountain bike, tractor, ride-on lawnmower/snow blower, generator, exercise equipment, other (specify) Tools of the Trade Cash on hand or deposit Securities / Investments (circle appropriate): bonds, certificates, stocks, mutual funds, credit union shares, other (specify) Registered Retirement Savings Plan (RRSP) Type (specify) Registered Retirement Saving Plan (RRSP) Locked-In Plan Life Insurance - Cash Surrender Value Other: jewelry, antiques, artwork, other (specify) **TOTAL ASSETS & NET WORTH** TOTAL MONTHLY INCOME Net Income from Wages #1 Net Income from Wages #2 Disability / Social Services #1 Disability / Social Services #2 Child Support / Alimony Working Families Childcare Subsidy, other (specify) GST Credit \$ (x4 - | 12) =Rental Income Pension #1 CPP\$ OAS \$ Company \$ Private \$ Pension #2 CPP \$ Private \$ OAS\$ Company \$ Other (specify) Other (specify) TOTAL NET INCOME \$

MONTHLY EXPENSES
Credit Counselling Services of Peterborough

Date

Counsellor Client File# HOUSING MONTHLY EXPENSE LIVING MONTHLY EXPENSE 1^{S∓} Mortgage Food / Supplies 2nd Mortgage Clothing 3rd Mortgage Support payments House / Tenants Insurance Insurance: Life, funeral, other Condo fees Prescription medication Rent / Rent to own Over counter meds, vitamins, herbal remedies etc Water / Sewer Hydro / Hot water heater rental Therapies: Chiropractic, Physio, Massage, Aroma, Heat: Gas, Oil, Electric, Wood Naturopath, Hypnosis, etc Health aids: Eyeglasses, Well / Septic hearing aids, Med life call, etc Dental Water Systems: Softener, salts, treatments, etc Laundry / Dry cleaning Phone / Long distance Pets: Food, supplies, vets, Internet licenses, tags, grooming, etc Cell phones, pagers, etc Other (specify) MONTHLY EXPENSE Cable / Satellite PERSONAL / OTHER Security systems Tobacco Housekeeping Alcohol / Beverage Contracts: Snow / garbage removal, Reading / Music / Visual grass cutting, etc Home maintenance: Repairs, furnace Hair / Toiletries / Personal filters, décor, etc hygiene products, etc Other (specify) Entertainment / Dining MONTHLY EXPENSE WORK Lottery / Bingo, etc Client #1 - Lunch / Breaks Recreation: Lessons, sports, activities, hobbies, etc Client #2 - Lunch / Breaks Uniforms, footwear, safety eyewear, Memberships, fishing / gloves, etc hunting licenses, etc Office supplies: costs, postage, courier, Education: School, tuition. supplies, etc Equipment, tools Babysitter Computer supplies Parking Daycare Allowances Professional / Career Membership fees Accounting, income tax / Licenses returns, etc Bank fees Other (specify) **CAR / TRANSIT** MONTHLY EXPENSE Church / Charity Client #1 - Gas Gifts Client #2 - Gas Vacation / Travel Insurance Emergency / Savings Car maintenance / Repairs Other (specify) CAA (or equivalent) SUB TOTAL \$ Public transit, taxi, car pool, other, etc Debt (specify) Payment Debt Management Program Sticker tags, licenses, etc Payment Other (specify) SUB TOTAL \$ TOTAL EXPENSES Comments: Summary of Available Funds Net Income from all Sources Less Total Expenses **AVAILABLE FUNDS**

DEBT PROFILE		Name		Date		Counsellor						
Credit Counselling Services of Peterborough		DMP Deposit Terms		Starting Date	Distributi	on Date	Copy Received	File #				
Page of Sp				Special Instructi	Special Instructions							
#	Creditor Name	& Address		Date Incurred & Annual %	Reason for Borrowing & Security Held	Client's Amount	Regular Payments	Arrears Rating	Confirmed Net Balance	%	Pro-Rate Amount	
1												
	Postal Code			Account #		Contact & Phone #						
2												
				A 1 11			.,,					
3		PC	ostal Code	Account #		Contact & Pho	ne #					
						1						
		Po	ostal Code	Account #		Contact & Phone #						
4						-						
		Po	stal Code	Account #		Contact & Pho	ne #					
5												
		Po	stal Code	Account #		Contact & Phone #						
6												
7		Po	ostal Code	Account #		Contact & Pho	ne #					
'						1						
Postal Code					Contact & Phone #							
8			I		OVERDRAFTS							
		Po	stal Code	Account #		Contact & Pho	ne #					
9												
		Po	stal Code	Account #		Contact & Pho	ne #					
COI	MMENTS		<u> </u>			TOTALS						
						- \$						