



**ASSETS, NET WORTH & INCOME**

Credit Counselling Services of Peterborough

Client	File #
Counsellor	Copy Received

<b>ASSETTS &amp; NET WORTH</b>				Date
Real Estate – Location	Year Purchased	%	Cost Price \$	Current Value
Less Mortgages	Held by		Due Date	Less 1st
1st			Due Date	Less 2nd
2nd			Due Date	Less 3rd
3rd			Due Date	
Value of Equity in Real Estate				\$
Vehicle - Year	Make			Current Value:
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/snowblower, 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)				
<b>TOTAL ASSETS &amp; NET WORTH</b>				<b>\$</b>
<b>TOTAL MONTHLY INCOME</b>				
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 \$	OAS \$	Company \$	Private \$
Other (specify)				
Other (specify)				
<b>TOTAL NET INCOME</b>				<b>\$</b>

**MONTHLY EXPENSES**  
Credit Counselling Services of Peterborough

MONTHLY EXPENSES			Date
Counsellor	Client		File #
<b>HOUSING</b>	<b>MONTHLY EXPENSE</b>	<b>LIVING</b>	<b>MONTHLY EXPENSE</b>
1 <sup>st</sup> Mortgage		Food / Supplies	
2 <sup>nd</sup> Mortgage		Clothing	
3 <sup>rd</sup> 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, naturopath, hypnosis, etc	
Heat: Gas, Oil, Electric, Wood			
Well / Septic		Health aids: Eyeglasses, hearing aids, Med life call, etc	
Water Systems: Softener, salts, treatments, etc		Dental	
Phone / Long distance		Laundry / Dry cleaning	
Internet		Pets: Food, supplies, vets, licenses, tags, grooming, etc	
Cell phones, pagers, etc		Other (specify)	
Cable / Satellite		<b>PERSONAL / OTHER</b>	<b>MONTHLY EXPENSE</b>
Security systems		Tobacco	
Housekeeping		Alcohol / Beverage	
Contracts: Snow / garbage removal, grass cutting, etc		Reading / Music / Visual	
Home maintenance: Repairs, furnace filters, décor, etc		Hair / Toiletries / Personal hygiene products, etc	
Other (specify)		Entertainment / Dining	
<b>WORK</b>	<b>MONTHLY EXPENSE</b>	Lottery / Bingo, etc	
Client #1 – Lunch / Breaks		Recreation: Lessons, sports, activities, hobbies, etc	
Client #2 – Lunch / Breaks			
Uniforms, footwear, safety eyewear, gloves, etc		Memberships, fishing / hunting licenses, etc	
Office supplies: costs, postage, courier, etc		Education: School, tuition, supplies, etc	
Equipment, tools		Babysitter	
Parking		Computer supplies	
Daycare		Allowances	
Professional / Career Membership fees / Licenses		Accounting, income tax returns, etc	
Other (specify)		Bank fees	
<b>CAR / TRANSIT</b>	<b>MONTHLY EXPENSE</b>	Church / Charity	
Client #1 - Gas		Gifts	
Client #2 - Gas		Vacation / Travel	
Insurance		Emergency / Savings	
Car maintenance / Repairs		Other (specify)	
CAA (or equivalent)		<b>SUB TOTAL</b>	<b>\$</b>
Public transit, taxi, car pool, other, etc (specify)		Debt Management Program Payment	
Sticker tags, licenses, etc		Debt Management Program Payment	
Other (specify)			
<b>SUB TOTAL</b>	<b>\$</b>	<b>TOTAL EXPENSES</b>	
Comments:		Summary of Available Funds	
		Net Income from all Sources	
		Less Total Expenses	
		<b>AVAILABLE FUNDS</b>	<b>\$</b>

# DEBT PROFILE

Credit Counselling Services of Peterborough

Name		Date		Counsellor					
DMP Deposit Terms		Starting Date	Distribution Date	Copy Received	File #				
Page	of	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									
	Postal Code	Account #	Contact & Phone #						
3									
	Postal Code	Account #	Contact & Phone #						
4									
	Postal Code	Account #	Contact & Phone #						
5									
	Postal Code	Account #	Contact & Phone #						
6									
	Postal Code	Account #	Contact & Phone #						
7									
	Postal Code	Account #	Contact & Phone #						
<b>OVERDRAFTS</b>									
8									
	Postal Code	Account #	Contact & Phone #						
9									
	Postal Code	Account #	Contact & Phone #						
COMMENTS				TOTALS					
				\$					