

Impôtaxe

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Required Documents – Budget Management

Here is a list of the amounts necessary for the preparation of your personal budget. All amounts must be accurate (including sales taxes). In addition, for each expense you must know the date on which you must make the payment. For each contract please also obtain the date of the end or renewal of the contract.

INCOME

- ☐ Employment income (net)
- ☐ Commission Income
- ☐ Tips
- ☐ Income from self-employment
- ☐ Rental income
- ☐ Child benefits - federal
- ☐ Child benefits - provincial
- ☐ Alimony
- ☐ Employment Insurance
- ☐ Health insurance | Disability insurance
- ☐ Scholarship
- ☐ Amount you save (RRSP, TFSA, etc.)
- ☐ Grant
- ☐ Other income

HOUSING

- ☐ Mortgage or rent
- ☐ Condominium fees
- ☐ Insurance
- ☐ School taxes (if not included in your mortgage payments)
- ☐ Municipal taxes (if not included in your mortgage payments)
- ☐ Electricity
- ☐ Heating
- ☐ Water
- ☐ Maintenance (snow removal, landscaping, household products, furniture, etc.)
- ☐ Internet | Cable | Telephone
- ☐ Cellular

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VEHICLE

- ☐ Car payments
- ☐ Car registration
- ☐ Drivers licence
- ☐ Car Insurance
- ☐ Repair and maintenance
- ☐ Gas
- ☐ Parking
- ☐ Public transportation (bus, subway, train, taxi, etc.)

FOOD

- ☐ Grocery
- ☐ Restaurant | Caffe

REPAYMENT OF DEBTS

For each of the debts provide the following information: authorized amount, total amount of debt, minimum payment required, interest rate.

- ☐ Line of credit
- ☐ Credit card
- ☐ Personal loan
- ☐ Student loan
- ☐ Bank charges

HEALTH & INSURANCE

- ☐ Health care (drugs, glasses, dentist, optometrist, physiotherapist, psychologist, etc.)
- ☐ Life insurance
- ☐ Critical health insurance
- ☐ Disability Insurance

LIFESTYLE

- ☐ Daycare
- ☐ Outing
- ☐ Trips
- ☐ Gym | Sport
- ☐ Hairdresser
- ☐ Clothing | Shoes
- ☐ Gifts
- ☐ Donations
- ☐ Support of a loved one
- ☐ Study (tuition, books, etc.)
- ☐ Pets