

**MONTHLY HOUSEHOLD BUDGET**

NAME OF APPLICANT(S):.....

How much does your household earn each month?

INCOME:

- 1. Gross Monthly Income: \_\_\_\_\_ \$ \_\_\_\_\_
- 2. Less Deductions \_\_\_\_\_ \$ \_\_\_\_\_
- 3. Net Take Home Pay: \_\_\_\_\_ \$ \_\_\_\_\_
- 4. Add- Spouse's Monthly Income (if employed full-time) \_\_\_\_\_ \$ \_\_\_\_\_
- 5. Add - Other Income (specify) \_\_\_\_\_ \$ \_\_\_\_\_
- 6. Net Monthly Income \_\_\_\_\_ **\$ \_\_\_\_\_**

How much does your household spend each month on the following?

EXPENDITURE:

7. Shelter

- (a) Mortgage (including taxes ) or Rent \_\_\_\_\_ \$ \_\_\_\_\_
- (b) House Insurance \_\_\_\_\_ \$ \_\_\_\_\_
- (c) Maintenance and Repairs to Property \_\_\_\_\_ \$ \_\_\_\_\_
- (d) Gas \_\_\_\_\_ \$ \_\_\_\_\_
- (e) Electricity \_\_\_\_\_ \$ \_\_\_\_\_
- (f) Telephone \_\_\_\_\_ \$ \_\_\_\_\_
- (g) Water \_\_\_\_\_ \$ \_\_\_\_\_
- (h) Cable TV \_\_\_\_\_ \$ \_\_\_\_\_
- TOTAL \_\_\_\_\_ **\$ \_\_\_\_\_**

8. Transportation: Do you or your family own a motor vehicle? Yes ( ) No ( )  
If yes, how much is spent each month on the following:

- (a) Licence \_\_\_\_\_ \$ \_\_\_\_\_
- (b) Insurance \_\_\_\_\_ \$ \_\_\_\_\_
- (c) Operating Cost \_\_\_\_\_ \$ \_\_\_\_\_

If no, how much is spent each month on:

- (d) Public Transportation \_\_\_\_\_ \$ \_\_\_\_\_

TOTAL \_\_\_\_\_ **\$ \_\_\_\_\_**

9. Living Expenses:

- (a) Food \_\_\_\_\_ \$ \_\_\_\_\_
- (b) Clothing \_\_\_\_\_ \$ \_\_\_\_\_
- (c) Medical and Dental \_\_\_\_\_ \$ \_\_\_\_\_
- (d) Life Insurance \_\_\_\_\_ \$ \_\_\_\_\_
- (e) Other (specify) \_\_\_\_\_ \$ \_\_\_\_\_
- TOTAL \_\_\_\_\_ \$ \_\_\_\_\_

10. Installment Obligations:

- (a) For Motor Vehicle \_\_\_\_\_ \$ \_\_\_\_\_
- (b) For Furniture, Appliances, etc. \_\_\_\_\_ \$ \_\_\_\_\_
- (c) Bank Loan (specify) \_\_\_\_\_ \$ \_\_\_\_\_
- (d) Credit Union loan (specify) \_\_\_\_\_ \$ \_\_\_\_\_
- (e) Credit Card \_\_\_\_\_ \$ \_\_\_\_\_
- (f) Other (specify) \_\_\_\_\_ \$ \_\_\_\_\_
- (g) Payment on Proposed Loan \_\_\_\_\_ \$ \_\_\_\_\_

11. Monthly Savings \_\_\_\_\_ \$ \_\_\_\_\_

12. Total Monthly Commitments (Add Total in Lines 7 to 11) \_\_\_\_\_ **\$ \_\_\_\_\_**

13. Balance (Line 6 minus Line 12) \_\_\_\_\_ \$ \_\_\_\_\_

**STATEMENT OF AFFAIRS**

**ASSETS**

**LIABILITIES**

Cash	\$.....	Amount due to Banks	\$ .....
Savings	\$.....	Amount due to Credit Unions and Associates	\$ .....
Life Insurance Policies:		Due to Merchants and Others	\$.....
Cash Value	\$.....	Outstanding Rates and Taxes	\$.....
Building/House	\$.....	Other Liabilities (List)	
Freehold Land	\$.....	.....	\$ .....
Livestock	\$.....	.....	\$ .....
Motor Vehicle(s)	\$.....	.....	\$ .....
Shares	\$.....	.....	\$ .....
Other Assets (List)			
.....	\$.....		
.....	\$.....		
.....	\$.....		
<b>Total Assets</b>	<b>\$.....</b>	<b>Total Liabilities</b>	<b>\$.....</b>

Name and Branch of Applicant's financial institution:

Commercial Bank:  
.....

Credit Union:  
.....

Building Society:  
.....

Indicate with a (√) the type of Account(s) held with the following financial institutions:

Type of Account	Commercial Bank	Credit Union	Building Society
Savings			
Deposit			
Chequing			
Loan			
Credit Card			
Shares			

**Financial Declaration**  
CD 007

Form

**Details of Liabilities (\$):**

Name of Lender	Loan Amount	Loan Balance	Monthly Payment	Interest Rate (%)	Loan Term	Maturity Date	Security being held
TOTAL							

**Comments:**

.....  
.....  
.....  
.....

Applicant's Signature: .....

Date: .....

Applicant's Signature: .....

Date: .....