

MONTHLY INCOME AND EXPENSE STATEMENT

For the month of _____, 20__

Due by the 10th of the following month

email: incomereports@csvan.com **fax:** 604 821 9870 **mail:** 300-9850 King George Blvd, Surrey BC V3T 0P9

Name: _____ Phone: _____ Email: _____
 Address: _____ New Address? Yes No
 Number in Household: _____ Marial Status: _____ Main income source: _____

INCOME: Please include copies of all paystubs or bank statements/other proof of income.

Total Net Employment Income:	\$ _____
Total Net Self-Employment Income (<i>complete page 2 first if self-employed</i>):	\$ _____
Total Pensions: CPP \$ _____ OAS \$ _____ Other \$ _____	\$ _____
Total Spousal Support/Child Support (<i>details</i>): _____	\$ _____
Total EI/ Social Assistance/PWD (<i>details</i>): _____	\$ _____
Total Other income (<i>details</i>): _____	\$ _____
Total Other Household Members Net Income (<i>details</i>): _____	\$ _____
TOTAL HOUSEHOLD INCOME	\$ _____

NON-DISCRETIONARY (ALLOWABLE) EXPENSES: Please include all receipts & proof of payment.

These expenses will be deducted from your net income when calculating surplus income.

Child or Spousal Support Paid (<i>details</i>): _____	\$ _____
Child Care Costs:	\$ _____
Medical Condition Expenses:	\$ _____
Other (<i>details</i>): _____	\$ _____
TOTAL NON-DISCRETIONARY EXPENSES	\$ _____

DISCRETIONARY EXPENSES: Please do not include receipts for the following expenses.

Rent/mortgage	\$ _____	Vehicle payments	\$ _____
Property taxes/condo fees	\$ _____	Vehicle maintenance/gas	\$ _____
Utilities/bills	\$ _____	Vehicle insurance	\$ _____
Phone/cable/internet	\$ _____	Other transportation	\$ _____
Home/renters' insurance	\$ _____	Laundry/dry cleaning	\$ _____
Life/health insurance	\$ _____	Grooming/toiletries	\$ _____
Groceries	\$ _____	Gifts/charitable donations	\$ _____
Entertainment/dining out	\$ _____	Miscellaneous	\$ _____
Smoking/alcohol	\$ _____	Payment to Trustee	\$ _____
TOTAL DISCRETIONARY EXPENSES		\$ _____	

TOTAL INCOME \$ _____ MINUS ALL EXPENSES \$ _____ = \$ _____ EXCESS/DEFICIT

NOTES (i.e. new employer, change in family situation): _____

I certify that this is an accurate statement of my monthly income and expenses.

Signature: _____ **Date:** _____

SELF-EMPLOYMENT MONTHLY INCOME AND EXPENSE STATEMENT

For the month of _____, 20____

Due by the 10th of the following month

email: incomereports@csvan.com **fax:** 604 821 9870 **mail:** 300-9850 King George Blvd, Surrey BC V3T 0P9

Name: _____ Phone: _____ Email: _____

Type of Business: _____

GROSS INCOME - Please attach copies of invoices and proof of payment

GST charged

Business/self-employment income	\$ _____	_____
Commission income	\$ _____	_____
Other income: _____	\$ _____	_____
TOTAL GROSS	\$ _____	_____
	TOTAL GST CHARGED:	_____

SELF-EMPLOYMENT EXPENSES – list business expenses, less the amount of GST paid

GST Paid

Advertising	\$ _____	_____
Business meals and entertainment (\$ _____ x 50%)	\$ _____	_____
Insurance (non-motor vehicle)	\$ _____	_____
Interest and bank charges	\$ _____	_____
Business fees, dues, memberships & subscriptions	\$ _____	_____
Legal, accounting, and other professional fees	\$ _____	_____
Office expenses & general supplies	\$ _____	_____
Inventory used for business	\$ _____	_____
Tools and Equipment	\$ _____	_____
Motor Vehicle Costs (_____ % business use)	\$ _____	_____
Business rent (or _____ % business use of home rent)	\$ _____	_____
Maintenance and repairs of equipment	\$ _____	_____
Salaries, wages and benefits paid (attach proof)	\$ _____	_____
Source deductions for employees (EI, CPP, tax)	\$ _____	_____
Business travel	\$ _____	_____
Telephone and utilities	\$ _____	_____
Other _____	\$ _____	_____
Other _____	\$ _____	_____
TOTAL SELF-EMPLOYMENT EXPENSES	\$ _____	_____

TOTAL GST PAID: _____

GST to be remitted or refunded (GST Charged - GST Paid): _____

Self-Employment Income after Expenses

Less: Income tax installments paid (attach proof) \$ _____

Less: CPP contributions x2 (you are both employer and employee) \$ _____

(Use the online CRA Payroll Deduction Calculator to determine the amount of monthly tax and CPP to be remitted)

NET SELF-EMPLOYMENT INCOME (enter on page 1) \$ _____

Note: As a self-employed person, we advise that you should consult with an accountant to determine what expenses can be claimed as business, and to have your tax installment amounts determined. Payments to CRA for income tax, GST & employee deductions should be calculated and paid on a monthly basis.