

# YOUR TO DO LIST

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**T:** 905.503.DEBT (3328)  
**E:** info@russocanhelp.com

To book your consultation  
**CLICK HERE**

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Please gather the following and bring with you to your Russo Corp. consultation. Complete the attached **BUDGET FORM** and send via fax or email prior to your consultation.

**FAX 905.503.2338 or info@russocanhelp.com**

- Proof of legal birthname (i.e birth certificate or passport)
- Two pieces of government issued I.D., with at least one being a photo i.d
- S.I.N number or copy of S.I.N. card
- All physical credit cards
- List of all debts (bring all available current statements)
- List of all assets and related documents (Real Property, RESP, RRSP, Life Insurance etc.)
- Ownership , insurance, lease/financial documents for all motorized and recreational vehicles
- Student loan information
- Proof of income from ALL household members (i.e. paystub, net take home if self employed)
- Past 3 months personal Bank statements for all accounts (including those joint with another person)
- 2 years prior Tax returns or Notices of Assessment
- Garnishments, CRA notices, separation agreements, divorce papers

# BUDGET FORM

## MONTHLY INCOME & EXPENSES:

Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_

Number of people in Family Unit: \_\_\_\_\_  Initial Budget  Counselling

INCOME:	DEBTOR (\$)	SPOUSE (\$)
Net employment income	<input type="text"/>	<input type="text"/>
Gross Self-employed income	<input type="text"/>	<input type="text"/>
Net Self-employed income	<input type="text"/>	<input type="text"/>
Net CPP, OAS, other Pension or Annuity	<input type="text"/>	<input type="text"/>
Net Child Support	<input type="text"/>	<input type="text"/>
Net Spousal Support	<input type="text"/>	<input type="text"/>
Net employment insurance income	<input type="text"/>	<input type="text"/>
Net social assistance income	<input type="text"/>	<input type="text"/>
Child tax Credit	<input type="text"/>	<input type="text"/>
Part-time or other income	<input type="text"/>	<input type="text"/>

## DISCRETIONARY EXPENSES (\$)

Rent or Mortgage	<input type="text"/>	Internet	<input type="text"/>	Cable or Satellite	<input type="text"/>
Taxes or Condo Fees	<input type="text"/>	Hydro	<input type="text"/>	Water, Other Utilities	<input type="text"/>
Heating	<input type="text"/>	Home Repairs/Maintenance	<input type="text"/>	Haircuts & Grooming	<input type="text"/>
Telephone	<input type="text"/>	Smoking	<input type="text"/>	Alcohol	<input type="text"/>
Cell Phone	<input type="text"/>	Sports & Recreation	<input type="text"/>	Entertainment	<input type="text"/>
Charitable Donations	<input type="text"/>	Birthdays, Gifts	<input type="text"/>	Tuition, Union Dues	<input type="text"/>
Prescriptions, Drugs	<input type="text"/>	Dental	<input type="text"/>	Groceries/Toiletries	<input type="text"/>
Lunches, Coffee	<input type="text"/>	Landry/Dry-Cleaning	<input type="text"/>	Clothing	<input type="text"/>
Pets	<input type="text"/>	Children Allowance	<input type="text"/>		

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Newspapers. Magazines	<input type="text"/>	Children's Activities	<input type="text"/>	Babysitting	<input type="text"/>
Vehicle(s) Lease/loan Payment(s)	<input type="text"/>	Licensing	<input type="text"/>	Fuel	<input type="text"/>
Oil, Lube & Repair	<input type="text"/>	Parking	<input type="text"/>	TTC, GO, Etc.	<input type="text"/>
Vehicle Insurance	<input type="text"/>	Property Insurance	<input type="text"/>	Contents Insurance	<input type="text"/>
Life Insurance	<input type="text"/>	Disability Insurance	<input type="text"/>	Proposal Payments	<input type="text"/>
Payment to Trustee fees, surplus income or Proposal	<input type="text"/>				

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