

Here is an example of a personal expenditures worksheet that the CRA may ask you to complete. **DO NOT COMPLETE A FORM LIKE THIS UNTIL YOU CONSULT LEGAL TAX COUNSEL.**

## PERSONAL EXPENDITURES WORKSHEET

*In preparing the following schedule, you may find it easier to consider your weekly or monthly spending and multiply accordingly while keeping in mind significant events (i.e.: birthdays, Christmas, weddings...)*

### Household Expenditures

DESCRIPTION	2003	2004	2005
1) FOOD:			
- from stores	_____	_____	_____
- from restaurants	_____	_____	_____
2) SHELTER:			
A) Rented living Quarters:			
- rent	_____	_____	_____
B) Owned Quarters:			
- maintenance & repairs	_____	_____	_____
- property taxes	_____	_____	_____
- insurance premiums	_____	_____	_____
- mortgage interest	_____	_____	_____
C) Water, Fuel & Electricity	_____	_____	_____
D) Other Quarters:			
- travel /accommodations	_____	_____	_____
3) HOUSEHOLD OPERATIONS:			
- telephone	_____	_____	_____
- child care	_____	_____	_____
- pet expenses	_____	_____	_____
- cleaning supplies	_____	_____	_____
- paper, plastic & foil supplies	_____	_____	_____
4) CLOTHING:			
- women's wear	_____	_____	_____
- girls' wear	_____	_____	_____
- men's wear	_____	_____	_____
- boys' wear	_____	_____	_____
- infants' wear	_____	_____	_____
- clothing material, notions, laundry & dry cleaning etc...	_____	_____	_____
5) TRANSPORTATION:			
A) Auto and truck operation			
- fuel	_____	_____	_____
- maintenance & repairs	_____	_____	_____
- insurance premium	_____	_____	_____
B) Public Transportation			
- local & commuter	_____	_____	_____
- intercity (including air travel)	_____	_____	_____
6) HEALTH CARE:			

- medical & pharmaceutical \_\_\_\_\_
- eye care goods & services \_\_\_\_\_
- dental care \_\_\_\_\_
- private & public health ins. \_\_\_\_\_

- 7) PERSONAL CARE:
- personal care supplies & equipment \_\_\_\_\_
  - hair cutting, washing, styling \_\_\_\_\_

- 8) RECREATION:
- sporting & athletic equipment \_\_\_\_\_
  - toys, games, computer, hobby equipment, etc. \_\_\_\_\_
  - photographic goods & services \_\_\_\_\_
  - recreational vehicles & boats \_\_\_\_\_
  - home entertainment (radio, TV, VCR, cable, internet, etc.) \_\_\_\_\_
  - recreation services (spectator entertainment, recreation & sports facilities, package tour, etc.) \_\_\_\_\_

9) READING MATERIAL & OTHER PRINTED MATTER: \_\_\_\_\_

- 10) EDUCATION COSTS:
- kids or grandkids \_\_\_\_\_
  - sports /music lessons etc. \_\_\_\_\_

- 11) TOBACCO AND ALCOHOL:
- tobacco & smokers' supplies \_\_\_\_\_
  - alcohol beverages \_\_\_\_\_

- 12) SECURITY:
- life insurance premium \_\_\_\_\_
  - employment insurance premium \_\_\_\_\_
  - pension fund: CPP or QPP \_\_\_\_\_
  - other government \_\_\_\_\_
  - other excluding RRSP \_\_\_\_\_

- 13) GIFTS & CONTRIBUTIONS:
- money gifts & contributions \_\_\_\_\_
  - other (flowers, toys, etc.) \_\_\_\_\_
  - religious organizations \_\_\_\_\_
  - other charitable organizations \_\_\_\_\_

- 14) MISCELLANEOUS:
- interest on personal loans \_\_\_\_\_
  - union & professional assoc. dues \_\_\_\_\_
  - government pool & lottery tickets \_\_\_\_\_
  - Grandchildren \_\_\_\_\_
  - children \_\_\_\_\_
  - other \_\_\_\_\_

15) PERSONAL TAXES: \_\_\_\_\_

16) OTHER: \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_