

Restructuring Worksheet

Interviewed By: _____ Referred By: _____

Date Interviewed: _____ Date Signing: _____

Last name: _____ All given names: _____

Are you known by any other names? _____ (M/F) _____

Address (Number and Street Name, City, Province, Postal Code):
_____ Date moved in: (D) _____ (M) _____ (Y) _____

MAILING Address, if different from above (Number and Street Name, City, Province, Postal Code):
_____ Date moved in: (D) _____ (M) _____ (Y) _____

Telephone numbers:

Residence: _____ Cell: _____ Business: _____

Emergency contact:

Name: _____ Home: _____ Cell: _____

Previous Address if at current is less than one year. (Number and Street Name, City, Province, Postal Code):

SIN: _____ Date of birth: (M) _____ (D) _____ (Y) _____

Marital status: Married Widowed Divorced Single Separated Common-Law Since when: (D) _____ (M) _____ (Y) _____

Occupation:

Current Employer: _____ Since when: (D) _____ (M) _____ (Y) _____

Address of employer: _____

If unemployed, since when: _____

Legal name of spouse: _____ Spouse's SIN _____

Are you known by any other names? _____ (M/F) _____

Spouse's Address, if different from above (Number and Street Name, City, Province, Postal Code):

Spouse's employer: _____ Since when: _____

Spouse's occupation: _____ If Unemployed, since when: _____

Spouse's business phone: _____ Spouse's cell: _____

Dependents (all those who rely on you for financial support):

Names:	Relationship	DOB	Address	Income
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

If over 18, why dependent?

Monthly income and expense statement of the debtor and the family unit

Monthly income - # of people in the family _____

	Debtor	Spouse	Total
Net employment income (take home)	_____	_____	_____
Pension/Annuities	_____	_____	_____
Child support	_____	_____	_____
Spousal support	_____	_____	_____
Child tax benefit	_____	_____	_____
Employment insurance benefits	_____	_____	_____
Social assistance	_____	_____	_____
Self-Employment income (Gross) _____ (Net) _____	_____	_____	_____
Net monthly income:	_____ (1)	_____ (2)	_____ (3)
Net monthly income of the family unit: (1+2)			_____ (3)

Monthly non-discretionary expenses: family unit

Child support	_____	_____	_____
Child care	_____	_____	_____
Prescriptions	_____	_____	_____
Fine/Penalties imposed by the court	_____	_____	_____
Other	_____	_____	_____
Totals:	_____	_____	_____

Monthly discretionary expenses: family unit

Housing expenses:

Rent/Mortgage	_____
Property taxes/condo fees	_____
Heating/gas/oil	_____
Telephone	_____
Cable	_____
Power/water	_____
Other	_____

Living expenses:

Food/groceries _____
 Laundry / dry cleaning / _____

Clothing _____

Transportation:

Car lease / payments _____
 Repairs / maintenance / gas _____

Personal expenses:

Smoking _____
 Entertainment/sports/dining _____
 Gifts/charitable donations _____
 Allowance _____ Other _____

Insurance expenses:

House _____
 Furniture/contents _____
 Life insurance _____
 Vehicle _____

Non-Recoverable medical expenses:

Dental _____
 Other _____

Payments: (OFFICE USE ONLY)

To the estate _____
 To secure creditors _____

Total monthly discretionary expenses (family unit) _____ (10)

Assets

	Description/Location (VIN #, Account #)	Estimated Value	Exempt (Y/N)	Secured (Y/N)
Cash on hand/in bank	_____	_____	_____	_____
Stocks, bonds, investments	_____	_____	_____	_____
RRSP's, RRIF's, GIC's, RESP's	_____	_____	_____	_____
Pension Plans	_____	_____	_____	_____
Cash Surrender value of insurance policies	_____	_____	_____	_____
Household furnishings/personal effects	_____	_____	_____	_____
Real Estate (in Canada or elsewhere) House	_____	_____	_____	_____
Land/Cottage/Time Share	_____	_____	_____	_____
Rental/Business Properties	_____	_____	_____	_____
Motorized Vehicles (Year, make, model) Cars	_____	_____	_____	_____
Truck(s)/Van(s)	_____	_____	_____	_____
Recreational Vehicle(s)	_____	_____	_____	_____
Mobile Home(s)	_____	_____	_____	_____
Tools of Trade	_____	_____	_____	_____
Other assets of value:	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Farming assets (Use separate page)

For which year was your last tax return filed? _____ Received amount: \$ _____ Owing \$ _____
 Refund to come \$ _____

All employers for the last year:

Employers name:	Address:	Date started:	Date ended:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If you have borrowed money or pledged any of these assets as security, show details below:

Creditors name:	Assets pledged	Amount of loan
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

