

## What to bring to your budgeting appointment



When you come to see us, we like clients to bring in the following paper work. If you do not have everything that is ok. Just bring what you have. Primarily we are looking to know what your income is, what your regular expenses are and any debts.

- WINZ printout, showing benefits / allowances paid and any deductions – most recent
- Latest bank statement showing income and balance – last 2 months
- Details of any other income, incl ACC or board, etc
- Court proceeding letters or fines info
- Overdue bills
- General expenses, incl school fees, etc
- Info about money owed to friends / family
- Info on automatic payments
- Hire purchase or loan agreements
- Power / phone / internet accounts – last 2 months
- Baycorp or other debt recovery services letters – most recent including summary of outstanding amounts
- Information about gambling debts
- Previous budget advice worksheets

### List of items we will ask for information on;

<b>INCOME (weekly, net after tax)</b>
Salary / wages
Partner's income
Working for Families assistance
Child support
Benefit (before deductions)

<b>Monthly Expenses</b>
Bank fees
House mortgage
Electricity
Gas
Phone

Family Tax Credit
Accommodation supplement
Disability / Child Disability
Temporary Additional Support (TAS)
Student Loan / Allowance
ACC
Superannuation / Pension
Rent / board
Other earnings
<b>Weekly Expenses</b>
Benefit repayment
IRD payments
Court payments
Child support
Groceries - general
Groceries - other
Rent / board
Petrol / fuel
Fares
Personal cash
Liquor
Tobacco
Gambling
Childcare / daycare
Preschool (kohanga reo, playcentre, etc)
School costs (trips, lunch money, etc)
Giving (charity, church, koha, etc)
Children's pocket money
Superannuation
Savings
Other weekly costs

Mobile phone
Internet
Pay TV
Appliance rental
Credit contracts
Credit / store cards
Personal loans
Other monthly costs
<b>Annual Expenses</b>
House insurance
Contents insurance
Health / life insurance
Vehicle insurance
Vehicle registration
Warrant of Fitness
Vehicle maintenance
Road user charges (diesel)
School fees
School activity fees
Other school costs
Rates
Regional rates
Water rates
Recreation / memberships
<b>Other Expenses</b>
Heating (wood, coal, etc)
Taxation provision
Medical
Dental
Optician
Presents
Repairs
Clothing / shoes
Haircuts
Christmas club
Vet fees



**Auckland  
Central  
Budgeting**