

EXPENDITURE

11. During this accounting period, what was the total of the adult's expenditure on accommodation and personal needs?

House/rent/accommodation fees	Total amount paid \$
Accommodation/rent/board and lodging	\$
Refundable Accommodation Deposit / accommodation bond (nursing home)	\$
Utilities (power, phone, etc.)	\$
Council rates	\$
Home maintenance	\$
Insurance	\$
Other (includes mortgage repayments) – enter description	
	\$
	\$
Personal expenditure	Total amount paid \$
Food/clothing/toiletries/haircuts	\$
Medical (including insurance and pharmacy)	\$
Holidays	\$
Accountants/taxation	\$
Examination of accounts fee	\$
Other (includes loan, credit card repayments) – enter description	
	\$
	\$

ADD UP ALL THE AMOUNTS IN QUESTION 11 AND ENTER THE TOTAL HERE

\$

J

12. During this accounting period, did the adult make any loans, gifts or donations?

No — go to question 13

Yes — specify all loans, cash gifts and donations and what they were for (eg. loan paid to... for car)

Type of payment, to whom and what for	Total amount paid \$
	\$
	\$

ADD UP ALL THE AMOUNTS IN QUESTION 12 AND ENTER THE TOTAL HERE

\$

K

13. During this accounting period, did the adult:

- buy any investments (e.g. shares)
- buy any other asset valued at \$1000 or more (e.g. wheelchair)
- prepay for a funeral
- buy any real estate

No — go to question 14

Yes — specify all other types of expenditure below

Address of property or type of investment or asset	Total amount paid \$
	\$
	\$
	\$

ADD UP ALL THE AMOUNTS IN QUESTION 13 AND ENTER THE TOTAL HERE

\$

L

14. During this accounting period, did the adult pay out any other expenditure not already specified above (including the cost of selling any real estate)?

No — go to question 15

Yes — specify all other types of expenditure below

Types of expenditure	Total amount paid \$
Cost of selling any real estate	\$
	\$
	\$

ADD UP ALL THE AMOUNTS IN QUESTION 14 AND ENTER THE TOTAL HERE

\$

M

15. Total expenditure for this accounting period (add C+J+K+L+M) and enter the total amount here

\$

N

16. Total surplus or deficit for this accounting period (subtract N from I), enter the amount here and then indicate whether this amount is surplus or deficit

Surplus

Deficit

\$

O