

Basic Outline for Monthly Income

Employment Income

- Unusual Withholding
- Last Salary Raise
- Bonus
 - When Paid
(Annual / Bi-annual / Monthly)
 - Amount of Last Bonus

Note: Examine year-to-date totals closely to potentially reveal income not otherwise reflected on monthly paystub.

- Overtime
Note: Average historical overtime income to provide accurate picture of future overtime expected

- Benefits / Perks

COMMON EXAMPLES

- ✓ AUTOMOBILE
- ✓ PARKING
- ✓ FUEL REIMBURSEMENT
- ✓ AUTOMOBILE MAINTENANCE
- ✓ AUTOMOBILE INSURANCE
- ✓ HEALTH INSURANCE
- ✓ LIFE INSURANCE
- ✓ CELL PHONE/ TABLET / LAPTOP

Other Types of Employment Related Income

- Severance Income / Packages
- Pensions

Self-employment Income

- Owner draws
- Consultant Fees
- Benefits / Perks
COMMON EXAMPLES
 - ✓ AUTOMOBILE
 - ✓ FUEL
 - ✓ AUTOMOBILE MAINTENANCE
 - ✓ AUTOMOBILE INSURANCE
 - ✓ HEALTH INSURANCE
 - ✓ LIFE INSURANCE
 - ✓ CELL PHONE/ TABLET / LAPTOP
- Expenses paid out of business accounts

Note: In contrast to Benefits / Perks, these are payments from the company for personal expenses. i.e., a cell phone billed personally but paid from the business would fall into this category and be considered an additional form of income.

Non-employment Income

- Interest Income
 - Which accounts
 - Balances
 - Paid Annually / Quarterly / Monthly
- Dividend Income
 - What stocks
 - Value
 - Which account(s)
 - Basis
- Royalty Income
 - From what
 - Long term
 - Income up or down (history)
- Rental Income
 - From what
 - How long
 - Up or Down
- Capital Gains
 - What was sold
 - Basis
 - Tax Impact
- Trust Income
 - Type of Trust
 - Discretionary
- Social Security Benefits
- Unemployment Benefits
- Disability and Worker's Compensation
- Gifts and Prizes
 - Lotto
 - Gambling Winnings
- Child Support received from other Obligor
- Alimony (or Maintenance)
- Other Income