



PERSONAL DETAILS Full name Home address			
		Postcode	
Telephone no.		Mobile no.	
ASSETS		LIABILITIES	
Value of private residence	£	Residential mortgage	£
Value of other properties	£	Other mortgages	£
Pension	£	Secured loans	£
Life policies (surrender value)	£	Motor vehicle finance	£
Quoted stocks and shares	£	Credit card balance(s)	£
Investments	£	Overdraft(s)	£
Motor vehicles	£	Guarantees	£
Bank balance(s)	£	Other (please specify) £	
Value of personal effects	£	Other (please specify) £	
Other (please specify) £		Other (please specify) £	
TOTAL ASSETS	£	TOTAL LIABILITIES	£
MONTHLY INCOME		MONTHLY EXPENDITURE	
Your earnings after tax	£	Mortgage/Rent	£
Your partner's earnings after tax	£	Life insurance/Endowment policy	£
Child benefit if applicable	£	Pension	£
Other (please specify) £		Rates/Council tax	£
Other (please specify) £		Water/Gas/Electricity	£
Other (please specify) £		Buildings/Contents insurance	£
Other (please specify) £		Petrol/Car maintenance	£
		Car insurance/Vehicle tax	£
		Loans/HP/Credit cards	£
		Other costs (eg. holidays, Christmas)	£
TOTAL MONTHLY INCOME AFTER T	AX £	TOTAL MONTHLY EXPENDITURE	£