

# PERSONAL ASSET/LIABILITY/INCOME/EXPENDITURE

## PERSONAL DETAILS

Full name	<input type="text"/>		
Home address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Telephone no.	<input type="text"/>	Mobile no.	<input type="text"/>

## ASSETS

Value of private residence	£	<input type="text"/>
Value of other properties	£	<input type="text"/>
Pension	£	<input type="text"/>
Life policies (surrender value)	£	<input type="text"/>
Quoted stocks and shares	£	<input type="text"/>
Investments	£	<input type="text"/>
Motor vehicles	£	<input type="text"/>
Bank balance(s)	£	<input type="text"/>
Value of personal effects	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
<b>TOTAL ASSETS</b>	<b>£</b>	<input type="text"/>

## LIABILITIES

Residential mortgage	£	<input type="text"/>
Other mortgages	£	<input type="text"/>
Secured loans	£	<input type="text"/>
Motor vehicle finance	£	<input type="text"/>
Credit card balance(s)	£	<input type="text"/>
Overdraft(s)	£	<input type="text"/>
Guarantees	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
<b>TOTAL LIABILITIES</b>	<b>£</b>	<input type="text"/>

## MONTHLY INCOME

Your earnings after tax	£	<input type="text"/>
Your partner's earnings after tax	£	<input type="text"/>
Child benefit if applicable	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
Other (please specify)	£	<input type="text"/>
<b>TOTAL MONTHLY INCOME AFTER TAX</b>	<b>£</b>	<input type="text"/>

## MONTHLY EXPENDITURE

Mortgage/Rent	£	<input type="text"/>
Life insurance/Endowment policy	£	<input type="text"/>
Pension	£	<input type="text"/>
Rates/Council tax	£	<input type="text"/>
Water/Gas/Electricity	£	<input type="text"/>
Buildings/Contents insurance	£	<input type="text"/>
Petrol/Car maintenance	£	<input type="text"/>
Car insurance/Vehicle tax	£	<input type="text"/>
Loans/HP/Credit cards	£	<input type="text"/>
Other costs (eg. holidays, Christmas)	£	<input type="text"/>
<b>TOTAL MONTHLY EXPENDITURE</b>	<b>£</b>	<input type="text"/>