

Name: _____

D.O.B.: _____

Application: ☐ Single ☐ Joint

Partner: (if applicable): _____

Partner D.O.B.: (if applicable): _____

Address: _____

Dependent children: Under 16: _____ 16-18: _____

Other dependants: _____

Number in household: _____

Number of vehicles in household: _____

Housing tenure:
☐ Owner ☐ Mortgage ☐ Tenant – private ☐ Tenant – social ☐ Living with parents ☐ Other

Contact/team name: _____

Agency: _____

Agency address: _____

Membership code number: _____

Case reference number: _____

Date of statement: _____

Date of review: (if applicable): _____

Employment: ☐ Full-time ☐ Part-time
☐ Unemployed ☐ Not working due to illness / disability
☐ Self-employed ☐ Retired ☐ Carer ☐ Student ☐ Other

Partner's employment: ☐ Full-time ☐ Part-time
☐ Unemployed ☐ Not working due to illness / disability
☐ Self-employed ☐ Retired ☐ Carer ☐ Student ☐ Other

Overview	Amount (£)
Total income	£
Total outgoings	£
Savings contribution	£
Debt admin fee (if applicable):	£
Total available for priority creditors	£
Total available for non-priority creditors	£
Monthly Income	
Earnings	£
Benefits and tax credits	£
Pensions	£
Other income	£
Total income	£
Monthly Outgoings: Fixed Costs	
Rent	£
Mortgage	£
Other secured loans	£
Council tax / rates	£
Other home and contents	£
Gas	£
Electric	£
Other utility costs (e.g. coal, oil, calor gas)	£
Water	£
Care and health costs	£
Transport and travel	£
School costs	£
Pensions and insurances	£
Professional costs	£
Other essential costs	£
Total fixed costs	£
Monthly Outgoings: Flexible Costs	
Communications and leisure	£
Food and housekeeping	£
Personal costs	£
Total flexible costs	£
Total monthly outgoings (fixed and flexible)	£

Please confirm you have considered (or discussed with an adviser) the use of any assets to make lump sum payments **Tick to confirm** ☐

Please confirm that a monthly contribution to savings has been considered (or discussed with an adviser) **Tick to confirm** ☐

Additional notes (e.g. reasons for debt, circumstances, temporary situations)

e.g. Made redundant in June 2014 and was out of work for 6 months

e.g. Communications and leisure: Mobile phone - client has multiple family members abroad

Priority Debts

Total priority debts

Token Payments

Date: