

**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 (£)
<b>Total income</b>	£
<b>Total outgoings</b>	£
Savings contribution	£
Debt admin fee (if applicable):	£
<b>Total available for priority creditors</b>	£
<b>Total available for non-priority creditors</b>	£
<b>Monthly Income</b>	
Earnings	£
Benefits and tax credits	£
Pensions	£
Other income	£
<b>Total income</b>	£
<b>Monthly Outgoings: Fixed Costs</b>	
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	£
<b>Total fixed costs</b>	£
<b>Monthly Outgoings: Flexible Costs</b>	
Communications and leisure	£
Food and housekeeping	£
Personal costs	£
<b>Total flexible costs</b>	£
<b>Total monthly outgoings (fixed and flexible)</b>	£

**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

☐ (tick if you have continued on next page)

**Total priority debts**



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☐ *(tick if you have continued on next page)*

**Total non-priority debts**

Token Payments

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Date: