



Statement of Personal Details Assets & Liabilities, Income & Expenditure

Monthly Income	You	Partner
Full Name		
Salary / Drawings (Gross)		
Bonus		
Overtime		
Other Monthly Income (please detail e.g. Rentals, Interest, Dividends, Fees etc.)		
Rent		
Interest		
Dividends		
Fees		
Working Family Tax Credit		
Child Benefit		
Other Benefits		
Total Monthly Income		

Total Household Monthly Expenditure	
Tax / NI / VAT	
Mortgage / Rent	
Ground Rent / Property Maintenance / Ground Rent or Services	
Council Tax / Water Rates	
Gas / Electricity	
Insurance / Buildings / Contents / Health / Life	
Travel / Car Insurance & Tax	
Maintenance of ex-partner	
Loan / Hire Purchase Repayments	
Credit / Store Card Repayments	

School / University Fees (Please provide expiry date(s))	
Food / Housekeeping	
TV / Telephone / Broadband / Mobile	
Clothing / Gifts / Holiday / Leisure / Pets	
Savings / Pension	
Other Regular Commitments (Please specify)	
Total Monthly Expenditure	

Please provide details of debts you have including overdraft balances

Owner	Type of Debt	Provider	Amount outstanding £	Monthly Payments £	Expiry Date

Assets			Liabilities	
Residential Home	Yes / No	£ (Market value)	Mortgage / Property Loans	
Title Holder(s)			Lender	
Address			Current Value	£
			Balance Outstanding	£
Postcode				
Property Portfolio	Yes / No	£ (Market value)	Balance Outstanding	£

Please complete details for the property/properties on a Property Schedule and attach

Life Policies			Bank Loans / Overdrafts / Hire Purchase	
Provider		£	Provider	
Provider		£	Balance Outstanding	£
Investments / Shares / PEPs / ISAs			Guarantee Obligations	
Provider		£		£
Provider		£		£
Pension Arrangements			Credit / Store Cars	
Provider		£	Provider	
Provider		£	Balance Outstanding	£

Provider		£	Monthly Payment	£
Provider		£	Term Remaining	
Other Assets (i.e. cars, value of shareholding in company etc.)			Other Liabilities (i.e. additional loans, store cards, etc.)	
		£		£
		£		£

Total Assets	
Less	
Total Liabilities	
Net Means	

Declaration and Signature:

I / We (insert name(s)) _____ confirm that:

1. I make this Statement on my own behalf and confirm that its contents are true to the best of my knowledge, information and belief.
2. This Statement is given in relation to my on-going indebtedness / liabilities and to my current financial circumstances.

Data Protection Consent

By submission of this Statement by you, you confirm that you have told the person(s) named on this form of all the purposes for which we will use the data that has been supplied to us.

Signed by the above named

Signature _____ Printed Name _____ Date _____

Signature _____ Printed Name _____ Date _____

