

Account number		Date	
Borrower 1	Name	Borrower 1 employment status (Circle all that apply)	Full-time / Part-time / Self-employed / Unemployed / Retired / Carer / Student / Not working (Illness/disability) / other
	Contact number		
Borrower 2	Name	Borrower 2 employment status (Circle all that apply)	Full-time / Part-time / Self-employed / Unemployed / Retired / Carer / Student / Not working (Illness/disability) / other
	Contact number		
Borrower 3	Name	Borrower 3 employment status (Circle all that apply)	Full-time / Part-time / Self-employed / Unemployed / Retired / Carer / Student / Not working (Illness/disability) / other
	Contact number		
Borrower 4	Name	Borrower 4 employment status (Circle all that apply)	Full-time / Part-time / Self-employed / Unemployed / Retired / Carer / Student / Not working (Illness/disability) / other
	Contact number		
How many people live in the property?		How many are adults?	
		How many are children between 16 - 18?	
		How many are children under 16?	

Income						
Regular income	Monthly	Weekly		Pension	Monthly	Weekly
Borrower 1 salary (after tax)	£	£		State Pension	£	£
Borrower 2 salary (after tax)	£	£		Private / Work pension	£	£
Borrower 3 salary (after tax)	£	£		Pension Credit	£	£
Borrower 4 salary (after tax)	£	£		Other pension 1	£	£
Other earnings (self-employment)	£	£		Other pension 2	£	£
Benefits	Monthly	Weekly		Additional income	Monthly	Weekly
Universal Credit	£	£		Maintenance / Child Support	£	£
Jobseeker's Allowance	£	£		Boarders or lodgers	£	£
Income Support	£	£		Non-dependant's contributions	£	£
Working Tax Credit	£	£		Student loans / grants	£	£
Child Tax Credit	£	£		Other income	£	£
Child Benefit	£	£		<b>Income total</b>	£	
Employment Support Allowance	£	£		To convert weekly figures to monthly multiply by 52 and divide by 12		
Statutory Sick Pay	£	£		Supporting / explanatory notes		
DLA, Attendance Allowance, PIP	£	£				
Carer's Allowance	£	£				
Local Housing Allowance / Housing Benefit	£	£				
Other benefits	£	£				

Outgoings - Fixed costs - Do not include any values which are already deducted from salary						
Home and contents	Monthly	Weekly		Transport and travel	Monthly	Weekly
Rent	£	£		Public transport	£	£
Ground rent / service charges	£	£		Hire purchase vehicle	£	£
Together payment	£	£		Car insurance	£	£
Mortgage endowment	£	£		Road tax	£	£
Other mortgages / secured loans	£	£		MOT and maintenance	£	£
Council Tax	£	£		Breakdown cover	£	£
Appliance / furniture rental	£	£		Fuel, parking and toll costs	£	£
TV licence	£	£		Other transport costs	£	£
Other home and contents costs	£	£		School Costs	Monthly	Weekly
Utilities	Monthly	Weekly		School uniform	£	£
Gas	£	£		After school clubs / trips	£	£
Elec	£	£		Other school costs	£	£
Other utilities (coal / oil)	£	£		Professional costs	Monthly	Weekly
Water supply and waste	£	£		Professional courses	£	£
Care and health costs	Monthly	Weekly		Union fees	£	£
Childcare costs	£	£		Professional fees	£	£
Adult care costs	£	£		Other professional costs	£	£
Child maintenance / support	£	£		<b>Fixed costs total</b>	£	
Prescriptions and medicines	£	£		To convert weekly figures to monthly multiply by 52 and divide by 12		
Dentists and opticians	£	£		Supporting / explanatory notes		
Other care costs	£	£				
Pension and insurance	Monthly	Weekly				
Pension payments	£	£				
Life insurance	£	£				
Mortgage PPI	£	£				
Buildings and contents insurance	£	£				
Health insurance	£	£				
Other pension / insurance	£	£				

**Outgoings - flexible costs**

Communications and leisure	Monthly	Weekly
Home phone / internet / TV and film packages	£	£
Mobile phones	£	£
Hobbies, leisure, sport	£	£
Gifts, birthdays, charity donations, festivals	£	£
Pocket money	£	£
Newspapers, magazines, stationery, postage	£	£
Other communication costs	£	£
Food and housekeeping	Monthly	Weekly
Groceries	£	£
Nappies and baby items	£	£
School meals, meals at work	£	£
Laundry and dry cleaning	£	£
Alcohol	£	£
Smoking products	£	£
Vet bills, pet insurance, pet food	£	£
House repairs and maintenance	£	£
Other food and housekeeping costs	£	£

Personal costs	Monthly	Weekly
Clothing and footwear	£	£
Hairdressing	£	£
Toiletries	£	£
Other personal costs	£	£
Savings	Monthly	Weekly
Contributions to savings	£	£
Debt administration	Monthly	Weekly
Debt administration fee	£	£
<b>Flexible costs total</b>	<b>£</b>	

To convert weekly figures to monthly multiply by 52 and divide by 12

Supporting / explanatory notes

**Priority debts - arrears on mortgage, rent, service charges, secured loans, utilities, Council Tax and court fines etc.**

Creditor	Arrears / balance	Monthly	Weekly
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
<b>Priority debts total</b>	<b>£</b>	<b>£</b>	

To convert weekly figures to monthly multiply by 52 and divide by 12

Supporting / explanatory notes

**Non priority debts - credit cards, personal loans, store card, HP, catalogues, CCJ, IVA, debt management, overdraft etc.**

Creditor	Arrears / balance	Monthly	Weekly
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
<b>Non priority debts total</b>	<b>£</b>	<b>£</b>	

To convert weekly figures to monthly multiply by 52 and divide by 12

Supporting / explanatory notes

**Summary**

Total monthly income	£
Total monthly fixed costs	£
Total monthly flexible costs	£
Total monthly priority debts	£
Total monthly non priority debts	£

INCOME	£	
EXPENDITURE	£	
DISPOSABLE INCOME	£	
PAYMENT PROPOSAL	Monthly	Weekly
	£	£

Supporting / explanatory notes