

Financial Statement

For Office Use Only	
ID	
Review	

Name _____

Address _____

Email _____ Telephone _____

Your Date of Birth _____ Partner's Date of Birth _____

Income <small>(Please enclose copies of three recent payslips)</small>	Weekly or Monthly	
Wages <small>(If overtime or bonus applies please supply average of the last three months)</small>		
Salary <small>(After all deductions)</small>		
Partner's or Second Salary <small>(After all deductions)</small>		
Benefits		
Maternity		
Sickness/Invalidity		
Child Benefit		
Retirement Pension		
Unemployment Benefit/Income Support		
Working Family Tax Credit and/or Child Tax Credit		
Contributions		
Maintenance		
Lodger/Dependants		
Total		

Please indicate the date which would be convenient for your monthly payment (or day of the week if you prefer to make weekly payment).

Monthly Date _____

or Weekly Day _____

Please indicate the number and age of dependants.

Number of Dependants _____

Age of Dependants _____

Expenditure

Marital Status _____

No. of Dependants _____

	Weekly	or	Monthly
Rent			
Mortgage			
Rent/Mortgage Arrears			
Second Mortgage			
Endowment/Mortgage Protection			
Child Maintenance			
Life/House Insurance			
Council Tax			
Council Tax Arrears			
Water Rates			
Gas			
Electric			
Telephone			
Clothing			
TV Licence/Rental			
Car Tax/Insurance			
Travelling Expenses			
Housekeeping			
Spending Money			
Other (please state)			
Total			

Please note: The above items relate to **ongoing** living expenses for which you will continue to make your own payment arrangements. Please ensure that this figure is sufficient for your needs, and also that no items of expenditure can be considered excessive.

Creditor Details in Full

Please ensure that all sections are completed for each creditor. Please note that we cannot proceed if any section is not complete. An example is provided below for your assistance.

Client Name

Address

Creditor Name <i>Joseph Bloggs Finance</i> Note: Company to whom you owe money.	Address <i>2 Any Street</i> Note: Ensure creditor's name and address details have not changed due to being taken over by collection agency. Details on recent statement or agreement.	
Amount Owed <i>£7,500</i> Note: Obtain balance from latest statement.	Town <i>Any Town</i>	Postcode <i>AB1 2CD</i>
In Whose Name Note: The name on the agreement.	Account Ref No. <i>ABC123456</i> Note: Obtain from statement or agreement.	Sortcode Note: Please supply if the creditor is a bank or building society.
Original Monthly Payment <i>£138.00</i> Note: As shown on statement or agreement.	Payable To <i>J B Finance</i> Note: The name to whom you have written out cheques.	Telephone <i>01234 123456</i>

Creditor Name	Address	
Amount Owed	Town	Postcode
In Whose Name	Account Ref No.	Sortcode
Original Monthly Payment	Payable To	Telephone

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