



# Statement of assets, liabilities, income and expenditure

Borrower name

Date

Monthly income	£ per month	Assets	£ '000	Details
Your net income <i>(after tax)</i>		Cash		
Your partner's net income <i>(after tax)</i>		Shares		
Other income <i>(Investments, etc)</i>		Life Policy <i>(surrender value only)</i>		
Benefits / CSA		Personal Dwelling House		
		Other Property 1		
		Other Property 2		
		Other Investments		
<b>Total monthly income after tax (A)</b>		<b>Total Assets (A)</b>		

Monthly expenditure	£ per month	Liabilities	£ '000	Details
Mortgage/Rent		Overdraft		
Life assurance/ endowment policy/ pension		Mortgage		
Council Tax		Car loan/HP		
Utilities & Communications		Personal loan 1		
Home Insurance		Personal loan 2		
Travel Costs <i>(fuel/tax/maintenance)</i>		Personal loan 3		
Food expenditure		Store/credit card 1		
Clothing costs		Store/credit card 2		
Other loans/HP		Store/credit card 3		
Credit Cards		Personal tax		
Leisure & Entertainment		Personal guarantees signed		
Subscriptions		Other		
Other costs e.g. holidays/Christmas		Other		
<b>Total monthly Expenditure (B)</b>		<b>Total Liabilities (B)</b>		
<b>Monthly income surplus (A-B)</b>		<b>Net assets/deficit (A-B)</b>		