

**Income & Expenditure Questionnaire**

Please try to complete your income and expenditure in as much detail as possible. You should be able to find most of the information you need on your bank statements.

You might not need to fill in a value in every box. Things like holidays or Christmas and birthday presents which are once a year or irregular can be harder to predict – try to think about what you would spend in a year and divide this by 12.

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| **Name:** |  |

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| **Date:**  |  |  |  |  |  |  |  |  |

**Monthly income**

Note that your wages should be the *net* amount (this is the amount you receive in your bank account after tax, National Insurance and pension deductions etc have been taken off).

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| **Household Expenses**  | **Monthly Income (£)** |
| Wages |  |
| Partner’s Wages |  |
| Child Benefit |  |
| Other Benefits |  |
| Partner’s Other Benefits |  |
| State Pension |  |
| Partner’s State Pension |  |
| Rental Income |  |
| Other Income |  |
| **Total Income** |  |

**Monthly expenditure**

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| **Household Expenses**  | **Monthly Expenditure (£)** |
| Electricity |  |
| Gas |  |
| Water Rates |  |
| Council Tax |  |
| Home & Mobile Telephone |  |
| Repairs & Renewals |  |
| Solid Fuel |  |
| Oil |  |
| Garden/Gardener/Plants etc |  |
| Help in House |  |
| **Household Expenses (*continued*)** | **Monthly Expenditure (£)** |
| House & Contents Insurance  |  |
| Other Insurance |  |
| TV Licence |  |
| Any Other Expenses |  |
| Alarm |  |
| Laundry & Dry Cleaning |  |
| Pet Foods |  |
| Holiday Home Expenses |  |
| Other Private Annual Expenses for Assets |  |

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| **Children & Grandchildren Expenses** | **Monthly Expenditure (£)** |
| Childcare / Baby Sitters |  |
| Pocket Money |  |
| Clothing & Footwear |  |
| Education Expenses |  |
| Other Children’s Expenses |  |

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| **Miscellaneous Expenses**  | **Monthly Expenditure (£)** |
| Food & General Housekeeping |  |
| Wines & Spirits |  |
| Own Clothing & Footwear |  |
| Partner’s Clothing & Footwear |  |
| Eating Out |  |
| Christmas & Birthday Presents |  |
| Holidays |  |
| Subscriptions (Excluding AA / RAC etc) |  |
| Sports, Hobbies and Entertainment |  |
| Books, Newspapers, Magazines, CD’s etc. |  |
| Provision for Unforeseen Expenses |  |
| Gifts to Charities |  |
| Travelling Expenses Other Than Motoring |  |
| Personal Care Expenses (e.g. Hair, Cosmetics) |  |
| Pocket Money (Own) |  |
| Pocket Money (Partner) |  |

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| **Cost of Servicing Debts**  | **Monthly Expenditure (£)** |
| Mortgage on Main Residence |  |
| Mortgage(s) on Other Property |  |
| Hire Purchase |  |
| Bank Loans |  |
| Bank Charges |  |
| Maintenance Payments |  |
| Other Similar Expenses |  |

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| **Motoring Expenses**  | **Monthly Expenditure (£)** |
| Road Tax |  |
| Fuel & Oil |  |
| Car Insurance | **Renewal Date** - |  |
| Servicing & Repairs |  |
| AA / RAC / Other Motoring Subscriptions |  |
| Other Motoring Expenses |  |

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| **Investment & Life Assurance** | **Monthly Expenditure (£)** |
| Life Assurance Premiums |  |
| Endowment Premiums |  |
| Pension Contributions |  |
| Regular Savings in Building Society |  |
| Regular Savings in ISA etc |  |
| Other Savings & Investments |  |

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| **Professional Fees**  | **Monthly Expenditure (£)** |
| Financial Planners Fees |  |
| Solicitor Fees |  |
| Accountants Fees – Non-Business |  |
| Dentists Fees |  |
| Opticians Fees |  |
| Veterinary Surgeon Fees |  |
| Doctors Fees |  |

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| **Care Expenses**  | **Monthly Expenditure (£)** |
| Long Term Care Costs |  |
| Normal Help in the Home |  |

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|  **Other Expenditure** (Please identify) | **Monthly Expenditure (£)** |
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| **Total Expenditure** |  |

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| **Summary** | **Monthly Balance (£)** |
| Total income (copy this from the top of page 1) |  |
| Total expenditure (copy from above after adding together all expenditure) |  |
| **Balance (Total income – Total Expenditure)** |  |