



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.

Name:

Date:

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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).

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

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	

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

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)	

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	

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

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	

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

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

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

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)	