

Personal asset, liability, income & expenditure form



Section 1: Personal Information

Title:		Date of Birth:	
First Name:		Middle Name (s):	
Surname:		Contact Number:	
Email:		Nationality: (optional)	
Address:		Post Code:	
		Date of Entry:	
Residential Status:	Owned / Rented / Living with Parents Other		
Previous Address: (If less than 3 years)		Post Code:	
		Date of Entry:	
Relationship Status:		Number of Dependents:	
Occupation:		Name of Employer	
Date Commenced Employment:		Gross Annual Salary:	£

Section 2: Spouse / Partner Details

Title:		Date of Birth:	
First Name:		Middle Name (s):	
Surname:			
Occupation:		Name of Employer	
Date Commenced Employment:		Gross Annual Salary:	£

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Section 3: Monthly Income and Expenditure

Income	Monthly Amount (£)	Expenditure	Monthly Amount (£)
Net Wage / Drawings:	£	Mortgage / Rent:	£
Spouse / Partner Net Wage / Drawings:	£	General / Domestic:	£
State Benefits:	£	Council Tax:	£
Investment Income:	£	Life Assurance / Pension:	£
Other Regular Income:	£	Other Regular Expenditure:	£
Total Income:	£	Total Expenditure:	£

Section 4: Personal Assets

Main Residence Address:			
Date Purchased:		Purchase Price:	£
Estimated Present Value:	£	Mortgage Outstanding:	£
Property Owned:	Solely Joint	Name of Lender(s):	
Term remaining:			

Other Property (1)			
Date Purchased:		Purchase Price:	£
Estimated Present Value:	£	Mortgage Outstanding:	£
Property Owned:	Solely Joint	Name of Lender(s):	
Term remaining:		Is this Property Let?	

Other Property (2)			
Date Purchased:		Purchase Price:	£
Estimated Present Value:	£	Mortgage Outstanding:	£
Property Owned:	Solely / Joint	Name of Lender(s):	
Term remaining:		Is this Property Let?	

Please use additional sheets for more than 2 additional properties.

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Section 5: Other Assets

Cash Deposits:	£	Name of Bank / BS:	
Stocks / Shares:	£	Life Policies: (Surrender Value)	£
Other Assets: (Please Specify)			

Section 6: Liabilities (Excluding Mortgages)

Funding / Loan Type: <i>(EG: Credit Card, Loan)</i>		Name of Lender:	
Amount Outstanding:	£	Monthly Instalments:	£
Credit Limit: <i>(If Applicable)</i>	£	Final Repayment Year: <i>(If Applicable)</i>	

Section 7: Credit profile

Have you missed any secured debt repayments in the last 12 months?	
Are you currently in a debt repayment plan with any of your creditors? (IVA)	
Have you been declined credit in the last 12 months?	
Are you aware of any defaults, bankruptcies or county court judgements (CCJs) registered against you?	
If the answer to any of the above is 'Yes', please give details below.	