

Income & Expenditure Questionnaire

Name:

Date:

Income - Monthly Please note - The figures to be entered below should be monthly amounts

	1st Person	2nd Person	Joint	Monthly Total	Annualised
Main wage, take-home pay					
Secondary wage, take-home pay					
Income support, Child benefit					
Other					
Total					

EXPENDITURE - Monthly Please note - The figures to be entered below should be monthly amounts

Household Expenses	1st Person	2nd Person	Joint	Total	Annualised
Electricity					
Gas					
Solid Fuel					
Oil					
Water Rates					
Council Tax					
Home Telephone					
Broadband					
Mobile phone					
TV Licence					
Sky / Digital TV					
Alarm					
Home & Contents Insurance					
Boiler Cover					
Household Warranties					
Total					

Cost of Servicing Debts	1st Person	2nd Person	Joint	Total	Annualised
Mortgage on Main Residence					
Mortgage on other property					
Hire Purchase					
Bank Loans					
Bank Charges / Account Fees					
Credit Cards / Store Cards					
Total					

Investment & Life Assurance	1st Person	2nd Person	Joint	Total	Annualised
Life Assurance Premiums					
BUPA/PPP/WPA Health Insurance					
Endowment Premiums					
Pension Contributions					
Regular Saving in Building Society					
Regular Saving in ISAs etc					
Other savings & investment					
TOTAL					

Motoring Expenses	1st Person	2nd Person	Joint	Total	Annualised
Car Tax					
Car Insurance					
Petrol & Oil					
Servicing & Repairs					
AA/RAC subscription					
Other Motoring Expenses					
Total					

Children & Grandchildren Expenses	1st Person	2nd Person	Joint	Monthly Total	Annualised
Childcare / Baby Sitters					
Clothing & Footwear					
Education Expenses					
Pocket Money					
Other Children's Expenses					
Maintenance					
Total					

Professional Fees	1st Person	2nd Person	Joint	Monthly Total	Annualised
Accountant's fees (non business)					
Architect's Fees					
Dentist's fees					
Doctor's fees / prescriptions					
Financial Planner's fees					
Optician's fees					
Osteopath / Chiro Fees					
Solicitor's fees					
Veterinary Surgeon's Fees					
Total					

Personal Expenses - Monthly	1st Person	2nd Person	Joint	Monthly Total	Annualised
Cigarettes & tobacco					
Eating Out					
Wines & Spirits					
Housekeeping, Food., etc					
Pet Foods					
Maintenance Payments					
Laundry & Dry Cleaning					
Help in House					
Garden/Gardener/Plants etc					
Sports / Hobbies					
CD's/Books/Newspapers					
Subscriptions					
Gifts to Charities					
Travelling Expenses other than Motoring					
Other Misc. Spending Money					
Total					

Please note - The figures to be entered below should be Annual, rather than Monthly amounts.

Lifestyle Expenses - Annual	1st Person	2nd Person	Joint	Monthly Total	Annualised
Own Clothing & Footwear					
Partner's clothing & footwear					
Christmas & Birthday presents					
Holidays					
Holiday Home Expenses					
Total					

Overall Summary	1st Person	2nd Person	Joint	Monthly Total	Annualised
Household Expenses					
Cost of Servicing Debts					
Investment and Life Assurance					
Motoring Expenses					
Children & Grandchildren Expenses					
Professional Fees					
Personal Expenses - Monthly cost					
Lifestyle Expenses - Annual					

Grand Total					
				Monthly	Annual

Notes for Completion of this form

Complete the expenditure for client 1, client 2 or joint.

The Total column, Overall Summary and Annualised column in each section will be calculated for you. You do not need to enter any data into these boxes.

If you pay an item annually rather than monthly - divide the annual figure by 12 and enter this into the box.