

Detailed Budget Planner



Net income Client 1: £

Net income Client 2: £

	Current Monthly Expenditure	Future Monthly Expenditure
Mortgage/Rent/Board	£	£
Mortgage Related Life Premiums	£	£
Buildings/Contents Insurance	£	£
Non-Mortgage Related Life Premiums	£	£
Private Pension Payments	£	£

UTILITIES		
Electricity	£	TOTAL £
Gas/Oil	£	
Water	£	
Telephone	£	
TV Licence/Satellite	£	

Council Tax	£	£
Credit Card Payments	£	£
Loan Repayments	£	£

FOOD & LIVING EXPENSES		
Holidays/Birthdays/Christmas	£	TOTAL £
Clothing	£	
Haircut/Beauty Treatments	£	
Food	£	
Sundries (Cigarettes/Magazines)	£	

Savings/Investments	£	£
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ENTERTAINMENT & LEISURE		
Socialising	£	TOTAL £
Club Fees	£	

Maintenance Payments/Child Fees	£	£
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OTHER		
School/College Fees	£	TOTAL £
Car Expenses	£	
Other Transport	£	
Mobile Phone	£	
Repairs/Decoration	£	
Miscellaneous Items	£	

Current Expenditure	£	£
Total Net Income	£	
Less Future Expenditure	£	
Equals Future Disposable Income	£	

Countrywide Mortgage Services, Sovereign House, Hockliffe Street, Leighton Buzzard, Bedfordshire LU7 1GT

Customer Declaration

I/We confirm that the Budget planner has been completed to the best of my/our knowledge and the information supplied is a reasonable representation of my/our current/future expenditure.

Signature

Date

Signature

Date

Mortgage Consultant Declaration

I confirm that an affordability assessment has been conducted with my client/s and they are happy to proceed on this basis.

Signature

Date