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Personal Financial Assessment

Strictly Private and Confidential

Introducer

Name:

Tel No: Email:

Please tick this box to confirm that we have authorization to contact the client

About You

	Self	Spouse/Partner
Title (Mr/Mrs/Miss/Ms)	<input type="text"/>	<input type="text"/>
First Name	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/>	<input type="text"/>
Ages of Dependents (if any)	<input type="text"/>	<input type="text"/>
Contact Phone No.	<input type="text"/>	<input type="text"/>
Alternative Phone No.	<input type="text"/>	<input type="text"/>
Email Address	<input type="text"/>	<input type="text"/>
No of People in Household	<input type="text"/>	<input type="text"/>

Accommodation

Rented Accommodation Yes No

Are you in rent arrears? Yes No Amount (E)

Homeowner Yes No

Are you in arrears? Yes No Amount (E)

Value of Property (E)

Outstanding Mortgage (E)

Lender

Second Charge Yes No Amount (E)

Employment

Self

Employed Yes No

Self Employed Yes No

Company Director Yes No

Employer/Business Name

Job Title

Spouse/Partner

Employed Yes No

Self Employed Yes No

Company Director Yes No

Employer/Business Name

Job Title

Income

Self

Basic Take Home (E) per month

Overtime (E) per month

Bonus/Commission (E) per month

Child Benefit (E) per month

Jobseekers Benefit (E) per month

Disability Allowance (E) per month

Pension Income (E) per month

Rental Income (E) per month

Child Maintenance (E) per month

Social Welfare (E) per month

Other (E) per month

Other (E) per month

Other (E) per month

Spouse/Partner

Basic Take Home (E) per month

Overtime (E) per month

Bonus/Commission (E) per month

Child Benefit (E) per month

Jobseekers Benefit (E) per month

Disability Allowance (E) per month

Pension Income (E) per month

Rental Income (E) per month

Child Maintenance (E) per month

Social Welfare (E) per month

Other (E) per month

Other (E) per month

Other (E) per month

Living Expenditure

(E) monthly

Home Mortgage/Rent

Other Mortgage

Secured Loans

Contents or House Insurance

Hire Purchase Payments

Food and Housekeeping

Electricity

Gas/Oil

Mobile Phone

Telephone

Life Policy

Personal Pension

Car Petrol

Car Service

Car Insurance

Car Tax

Car Hire Purchase

Public Transport

Child Care

Medical/Dental

(E) monthly

Clothing/Laundry

Household Maintenance/Contingency

Pets

Broadband/Internet

TV License

Sky/Cable

School Meals/Meals at Work

Sports Hobbies and Entertainment

School Trips

Travel

Healthcare

Child Support Payments

Refuse Collection

Other

Other

Other

Other

Other

Other

Other

