

Account Reference:

**Name:** \_\_\_\_\_

**D.O.B.:** \_\_\_\_\_

**Application:**  Single  Joint

**Partner (if applicable):** \_\_\_\_\_

**Partner D.O.B. (if applicable):** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Employment:**  Full-time  Part-time

Unemployed  Not working due to illness/disability

Self-employed  Retired  Carer  Student  Other

**Partner's Employment:**  Full-time  Part-time

Unemployed  Not working due to illness/disability

Self-employed  Retired  Carer  Student  Other

**Employer Details (if applicable)** \_\_\_\_\_

**Employer Name:** \_\_\_\_\_

**Employer Address:** \_\_\_\_\_

**Dependent children:** Under 16: \_\_\_\_\_ 16-18: \_\_\_\_\_

**Other Dependents:** \_\_\_\_\_

**Number in household:** \_\_\_\_\_

**Number of vehicles in household:** \_\_\_\_\_

**Housing tenure:**

Owner  Mortgage  Tenant-private

Tenant-social  Living with parents

Other

**Pay Reference/Works Number:** \_\_\_\_\_

Overview	Amount (£)
<b>Total income</b>	
<b>Total outgoings</b>	
Savings contribution	
Debt admin fee (if applicable)	
<b>Total available for priority creditors</b>	
<b>Total available for non-priority creditors</b>	
<b>Monthly Income</b>	
Earnings	
Benefits and tax credits	
Pensions	
Other income	
<b>Total income</b>	
<b>Monthly Outgoings: Fixed Costs</b>	
Rent	
Mortgage	
Other secured loans	
Council tax / rates	
Other home and contents	
Gas	
Electric	
Other utility costs (e.g. coal, oil, calor gas)	
Water	
Care and health costs	
Transport and travel	
School costs	
Pensions and insurances	
Professional costs	
Other essential costs	
<b>Total fixed costs</b>	
<b>Monthly Outgoings: Flexible Costs</b>	
Communications and leisure	
Food and housekeeping	
Personal costs	
<b>Total flexible costs</b>	

Please confirm you have considered (or discussed with an adviser) the use of any assets to make lump sum payments

Tick to confirm ✓

Please confirm that a monthly contribution from savings has been considered (or discussion with an adviser)

Tick to confirm ✓

**Additional notes (e.g. reasons for debt, circumstances, temporary situations)**

*e.g. made redundant in June 2014 and was out of work for 6 months*

*e.g. **Communications and leisure:** Mobile phone – client has multiple family members abroad*

