

Detailed budget planner



Net income Client 1: £

Net income Client 2: £

	Current monthly expenditure		Future monthly expenditure	
Mortgage/Rent/Board	£		£	
Mortgage Related Life Premiums	£		£	
Building/Contents Insurance	£		£	
Non-Mortgage Related Life Premiums	£		£	
Private Pension Payments	£		£	
Utilities				
Electricity	£		£	
Gas/Oil	£		£	
Water	£		£	
Telephone	£	Total	£	Total
TV Licence/Satellite	£	£	£	£
Council tax	£		£	
Credit card payments	£		£	
Loan repayments	£		£	
Food and living expenses				
Holidays/Birthdays/Christmas	£		£	
Clothing	£		£	
Haircut/Beauty Treatments	£		£	
Food	£	Total	£	Total
Sundries (Cigarettes/Magazine)	£	£	£	£
Savings/Investments	£		£	
Entertainment and leisure				
Socialising	£	Total	£	Total
Club Fees	£	£	£	£
Maintenance payments/Child fees	£		£	
Other				
School/College fees	£		£	
Car expenses	£		£	
Other transport	£		£	
Mobile phone	£		£	
Repairs/Decoration	£	Total	£	Total
Miscellaneous items	£	£	£	£
Current expenditure	£		£	
Total net income	£		£	
Less future expenditure	£		£	
Equals future disposable income	£		£	

Countrywide Mortgage Services, Countrywide House, 88-103 Caldecotte Lake Drive, Caldecotte, Milton Keynes, Buckinghamshire MK7 8JT.

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

SA0048 (07/10)

