

Personal Asset / Liability, Income and Expenditure Details

Please note – when filling out this form please use the tab and arrow keys to move between the relevant fields. Ensure you do **not** use the return or enter keys.

Your information

For details of how we and others will use your information, please look for the padlock symbol in either the accompanying Terms and Conditions, Consent Form for Credit Checks or contact 01442 877991.

1. Personal details

Title Mr Mrs Miss Ms Other
 (please specify)

First name
 Middle name(s)
 Surname
 Date of birth (DD/MM/YYYY)
 Address line 1
 Address line 2
 Address line 3
 Address line 4 OR overseas country
 Postcode
 Residential status Homeowner Renting Living with parents Other
 Relationship status Single Living with partner Married/In a civil partnership
 Widowed/Surviving civil partner Divorced/Dissolved/Separated
 Occupation (to be completed where principal in salaried employment)
 Name of employer
 Gross annual salary £ Date employment commenced
 (xx/xx/xxxx)

2. Spouse/Partner details

Title Mr Mrs Miss Ms Other
 (please specify)

First name
 Middle name(s)
 Surname
 Date of birth (DD/MM/YYYY)
 Occupation
 Name of employer
 Gross annual salary (xx/xx/xxxx) £ Date employment commenced

3. Monthly income and expenditure breakdown

	Income		Expenditure
Net drawings/salary	£ <input type="text"/>	Mortgage/Rent	£ <input type="text"/>
Spouse/Partner's net salary	£ <input type="text"/>	Life assurance/Pension	£ <input type="text"/>
State benefits (e.g. child benefit)	£ <input type="text"/>	General/Domestic	£ <input type="text"/>
Investment income	£ <input type="text"/>	Council tax payments	£ <input type="text"/>
Other regular income	£ <input type="text"/>	Other expenditure	£ <input type="text"/>
Total monthly income	£ <input type="text"/>	Total monthly expenditure	£ <input type="text"/>

4. Other personal liabilities – whether taken solely in your name or jointly with others, but excluding mortgage(s). All credit and store cards to be entered here.

Name of lender/Source of finance

Type of loan/funding (e.g. HP/leasing)

Amount outstanding £ Monthly instalments £

Credit limit (if applicable) £ Final repayment year (if applicable) (YYYY)

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Amount outstanding £ Monthly instalments £

Credit limit (if applicable) £ Final repayment year (if applicable) (YYYY)

Total monthly instalments £

5. Personal guarantees – provide details of any other guarantee obligations

Who was the guarantee granted for?

Purpose of the guarantee

Amount £

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Purpose of the guarantee

Amount £

6. Personal assets – please complete the details below

6.1 Main residence

Date Purchased (xx/xx/xxxx)	<input type="text"/>	Purchase Price	£	<input type="text"/>
Estimated present value	£ <input type="text"/>	Mortgage outstanding	£	<input type="text"/>
The property is owned:	Solely <input type="checkbox"/> OR Jointly <input type="checkbox"/>	Is the property let?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Name of lender(s)	<input type="text"/>			
Term remaining	<input type="text"/>	<input type="text"/>	<input type="text"/>	

6.2 Other property (1)

	years	months	Repayment method	
Date Purchased (xx/xx/xxxx)	<input type="text"/>	<input type="text"/>	Purchase Price	£ <input type="text"/>
Estimated present value	£ <input type="text"/>		Mortgage outstanding	£ <input type="text"/>
The property is owned:	Solely <input type="checkbox"/> OR Jointly <input type="checkbox"/>	Is the property let?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Name of lender(s)	<input type="text"/>			
Term remaining	<input type="text"/>	<input type="text"/>	<input type="text"/>	

6.3 Other property (2)

	years	months	Repayment method			
Date Purchased (xx/xx/xxxx)	<input type="text"/>	<input type="text"/>	Purchase Price	£ <input type="text"/>		
Estimated present value	£ <input type="text"/>		Mortgage outstanding	£ <input type="text"/>		
The property is owned:	Solely <input type="checkbox"/> OR Jointly <input type="checkbox"/>	Is the property let?	Yes <input type="checkbox"/> No <input type="checkbox"/>			
Name of lender(s)	<input type="text"/>					
Term remaining	<input type="text"/>	years	<input type="text"/>	months	Repayment method	<input type="text"/>

7. Other personal assets – provide the estimated present value of the following assets, do not include business assets.

Cash deposits	£	<input type="text"/>		
Name of Bank/Building Society	<input type="text"/>			
Quoted shares	£	<input type="text"/>		
Life policy(ies) (surrender value)	£	<input type="text"/>	Death cover	£ <input type="text"/>
Other	£	<input type="text"/>	Please specify	<input type="text"/>

CIN	<input type="text"/>	For Relationship Manager use only	Date	<input type="text"/>
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