

Liabilities

Tax Liability:	<input type="text" value="£"/>
Credit Cards:	<input type="text" value="£"/>
Bank Overdraft:	<input type="text" value="£"/>
Loans:	<input type="text" value="£"/>
	<input type="text" value="£"/>
	<input type="text" value="£"/>
	<input type="text" value="£"/>
	<input type="text" value="£"/>
Home Loan:	<input type="text" value="£"/>
Personal Loans:	<input type="text" value="£"/>
Hire Purchase:	<input type="text" value="£"/>
Total Liabilities:	<input type="text" value="£"/>
Contingent Liabilities:	<input type="text" value="£"/>
(Particulars of Guarantees etc):	<input type="text" value="£"/>

Assets

Bank Balance/s:	<input type="text" value="£"/>
Building Society Balances:	<input type="text" value="£"/>
Other Deposits:	<input type="text" value="£"/>
	<input type="text" value="£"/>
	<input type="text" value="£"/>
Investments (Quoted):	<input type="text" value="£"/>
Investments (Unquoted):	<input type="text" value="£"/>
Life Policy(ies):	<input type="text" value="£"/> s.v.
Sub Total:	<input type="text" value="£"/>
Property:	<input type="text" value="£"/>
	<input type="text" value="£"/>
	<input type="text" value="£"/>
	<input type="text" value="£"/>
Total:	<input type="text" value="£"/>
Less Liabilities:	<input type="text" value="£"/>
Surplus at This Date:	<input type="text" value="£"/>
Surplus as at Last Statement:	<input type="text" value="£"/>
(/ /)	
Difference (+ or -):	<input type="text" value="£"/>

Income Expenditure

First Annual Salary:	<input type="text" value="£"/>	Net Monthly:	<input type="text" value="£"/>
Second Annual Salary:	<input type="text" value="£"/>	Net Monthly:	<input type="text" value="£"/>
Regular Bonus/ Profit Share:	<input type="text" value="£"/>		
Annual Income from Investments:	<input type="text" value="£"/>		
Any Other Regular Income (e.g. Rents/ Covenants):	<input type="text" value="£"/>	Net Monthly: Other Income:	<input type="text" value="£"/>
Totals:	<input type="text" value="£"/>	Total Monthly Income:	<input type="text" value="£"/>
		Less Expenditure:	<input type="text" value="£"/>
		Monthly Surplus:	<input type="text" value="£"/>

Committed/Regular Monthly

Mortgage/Rent plus Council Tax:	<input type="text" value="£"/>
Housekeeping (Food, Cleaning etc.):	<input type="text" value="£"/>
Insurances (House, Car):	<input type="text" value="£"/>
Insurances (Life, Health, Illness):	<input type="text" value="£"/>
School/University Fees:	<input type="text" value="£"/>
Other Regular Commitments:	<input type="text" value="£"/>
Savings:	<input type="text" value="£"/>
Monthly Pro-Rata - Irregular Expenditure:	<input type="text" value="£"/>
Total Monthly Expenditure:	<input type="text" value="£"/>

Declaration

The above is a true statement of my/our financial position at this date

Signature(s): _____

Date: _____

NOTE: Statements in Individual Names. Where properties are in joint names the asset value should be shown as the total of the mortgage(s) outstanding plus half the equity (where equity is calculated as market value minus mortgage). All other jointly owned assets should be given half value.