

BUDGET PLANNER

(Please complete in blue/black ink)

Client (1) name:

Client (2) name:

Where expenditure is paid jointly please allocate to Client (1) only.

This form can be printed and completed by hand or sent and received digitally; autosums and totals may only update after pressing 'Enter'.

Net Monthly Income	Client (1)	Client (2)	Total
Main Earnings (Take Home Pay)	£	£	£
Secondary Earnings (Take Home Pay)	£	£	£
State Benefits (52/12 x Weekly Amount)	£	£	£
Investment/other Income *	£	£	£
Total Net Monthly Income	£	£	£

Monthly Expenditure	Client (1)	Client (2)	Total
Mortgage / Rent	£	£	£
Life Assurance	£	£	£
Pension Contributions	£	£	£
Property Insurance	£	£	£
Contents Insurance	£	£	£
Endowment Policy(ies) /ISA Savings *	£	£	£
Payment Protection	£	£	£
Ground Rent / Service Charge (Leasehold)	£	£	£
Property Repairs / Decoration	£	£	£
Council Tax	£	£	£
Electricity	£	£	£
Gas, Oil, Etc	£	£	£
Water Rates	£	£	£
Telephone	£	£	£
TV Rental / Licence	£	£	£
Healthcare / Insurance	£	£	£
Housekeeping / Food	£	£	£
Clothing / Hairdressing	£	£	£
Maintenance Payments	£	£	£
Car Loan / Personal Loan / HP / Credit Cards *	£	£	£
Travel Expenses (Public Transport / Petrol) *	£	£	£
Car Repairs / Servicing / Tax / Insurance, Etc *	£	£	£
Leisure Activities (Holidays, Birthdays, Etc)	£	£	£
Gym / Club / TV / Magazine Subscriptions	£	£	£
Going Out	£	£	£
School / College Fees / Children's Expenses	£	£	£
Pet Expenses	£	£	£
Gifts to Charity / Individuals	£	£	£
Other	£	£	£
Total Monthly Expenditure	£	£	£

Excess Or Deficit of Income Over Expenditure

£

Please provide any further details, including if you foresee any changes to your income or expenditure, overleaf or in your covering email.



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