STANDARD FINANCIAL STATEMENT

Name:
D.O.B.:
Application: ■ Single ■ Joint
Partner (if applicable)**:**
Partner D.O.B. (if applicable)**:**
Address:

Dependent children: Under 16: 16-18:
Other dependants:
Number in household:
Number of vehicles in household:
Housing tenure:
■ Owner ■ Mortgage ■ Tenant – private
■ Tenant – social ■ Living with parents ■ Other

Contact/team name:
Agency:
Agency address:

Membership code number:
Case reference number:
Date of statement:
Date of review (if applicable)**:**
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

Overview	Amount (£)
Total income	
Total outgoings	
Savings contribution	
Debt admin fee (if applicable):	
Total available for priority creditors	
Total available for non-priority creditors	
Monthly Income	
Earnings	
Benefits and tax credits	
Pensions	
Other income	
Total income	
Monthly Outgoings: Fixed Costs	
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	
Total fixed costs	
Monthly Outgoings: Flexible Costs	
Communications and leisure	
Food and housekeeping	
Personal costs	
Total flexible costs	
Total monthly outgoings (fixed and flexible)	

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 to savings has been considered (or discussed 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*

Debts

Priority Debts

Creditor	Owed (£)	Offer
e.g. *Haringey Council*		