

Please complete the information on the following pages as fully and accurately as possible. The information you advise here will be used to submit your application to the lender. Please return the form to your Business Manager.

| Monthly Income | You | Partner |
|---|-----|---------|
| Full Name | | |
| Salary / Drawings (Gross) | £ | £ |
| Bonus | £ | £ |
| Overtime | £ | £ |
| Other Monthly Income (Please detail e.g. Rentals, Interest, Dividends, Fees, etc) | | |
| Rent | £ | £ |
| Interest | £ | £ |
| Dividends | £ | £ |
| Fees | £ | £ |
| Working Family Tax Credit | £ | £ |
| Child Benefit | £ | £ |
| Other Benefits | £ | £ |
| Total Monthly Income | £ | £ |

| Total Household Monthly Expenditure | |
|--|---|
| Tax / NI / VAT | £ |
| Mortgage / Rent | £ |
| Ground Rent / Property Maintenance / Ground Rent or Services | £ |
| Council Tax / Water Rates | £ |
| Gas / Electricity | £ |
| Insurance / Buildings / Contents / Health / Life | £ |
| Travel / Car Insurance & Tax | £ |
| Maintenance of ex-partner | £ |
| Loan / Hire Purchase Repayments | £ |
| Credit / Store Card Repayments | £ |
| School / University Fees (Please provide expiry date(s)) | £ |
| Food / Housekeeping | £ |
| TV / Telephone / Broadband / Mobile | £ |
| Clothing / Gifts / Holiday / Leisure / Pets | £ |
| Savings / Pension | £ |
| Other Regular Commitments (Please specify) | £ |
| Total Monthly Expenditure | £ |

| Please provide details of debts you have including overdraft balances | | | | | |
|---|--------------|----------|-------------------------|-----------------------|--|
| Owner | Type of Debt | Provider | Amount outstanding £ | Monthly payments £ | Will this be cleared within 6 months? |
| | | | | | |
| | | | | | |

| Assets | | | Liabilities | | |
|--------------------|--|---|-------------------------|--|-------|
| Properties | | | Mortgage/Property Loans | | |
| Residential Home | | £ | Lender | | |
| Address | | | Current Value | | £ |
| | | | Balance Outstanding | | £ |
| | | | Monthly Payment | | £ |
| Postcode | | | Term Remaining | | years |
| Property Portfolio | | £ | Property Portfolio | | £ |

Please complete details for the property/properties on the attached Property Schedule

| Life Policies | | | Bank Loans / Overdrafts / Hire Purchase | | |
|----------------------------|--|---|---|--|-------|
| Provider (surrender value) | | £ | Provider | | |
| Provider (surrender value) | | £ | Balance Outstanding | | £ |
| Provider (surrender value) | | £ | Monthly Payment | | £ |
| Provider (surrender value) | | £ | Term Remaining | | years |

| Investments / Shares / PEPs / ISAs | | Guarantee Obligations | |
|--|---|--|-------|
| Provider | £ | | £ |
| Provider | £ | | £ |
| Provider | £ | | £ |
| Provider | £ | | £ |
| Pension Arrangements | | Credit / Store Cards | |
| Provider | £ | Provider | |
| Provider | £ | Balance Outstanding | £ |
| Provider | £ | Monthly Payment | £ |
| Provider | £ | Term Remaining | years |
| Other Assets (i.e. cars, value of shareholding in company, etc.) | | Other Liabilities (i.e. additional loans, store cards, etc.) | |
| | £ | | £ |
| | £ | | £ |

| | |
|-------------------|---|
| Total Assets | £ |
| Less | |
| Total Liabilities | £ |
| Net Means | £ |

Please provide any additional information in the box below

Declaration and Signature:

I / We (insert name(s)).....confirm that:

1. I make this Statement on my own behalf and confirm that its contents are true to the best of my knowledge, information and belief.
2. This Statement is given in relation to my on-going indebtedness / liabilities and to my current financial circumstances.

Data Protection Consent

By submission of this Statement by you, you confirm that you have told the person(s) named on this form of all the purposes for which we will use the data that has been supplied to us.

Signed by the above named

Signature..... Printed Name.....

Signature..... Printed Name.....

Date.....