

Statement of Assets and Liabilities

Monthly income <i>(per month)</i>	Assets £	Details
Earnings after tax:	Cash:	Institution held:
Partner's earnings after tax:	Shares:	Company/if listed:
Other (investments, etc.):	Life policy surrender value:	Company/maturity date:
Other:	Personal dwelling/home:	Owners/address:
Other:	Other property 1:	Owners/address:
Other:	Other property 2:	Owners/address:
Other:	Other investments:	Details:
TOTAL MONTHLY INCOME AFTER TAX (A)	TOTAL ASSETS (A)	
Monthly expenditure <i>(per month)</i>	Liabilities £	Details
Mortgage/rent:	Overdraft:	Balance/lender/up to date:
Life assurance/endowment/pension:	Mortgage:	Balance/lender/up to date:
Rates/council tax:	Car loan/HP:	Balance/lender/up to date:
Water/gas/electricity/phone:	Personal loan 1:	Balance/lender/up to date:
Home building and contents insurance:	Personal loan 2:	Balance/lender/up to date:
Travel to work:	Personal loan 3:	Balance/lender/up to date:
Petrol/car maintenance:	Store/credit card 1:	Balance/lender/up to date:
Car insurance/road tax:	Store/credit card 2:	Balance/lender/up to date:
Food/clothing:	Store/credit card 3:	Balance/lender/up to date:
Other loans/HP/credit cards:	Personal tax:	Year/when due:
Entertainment/subscriptions:	Personal Guarantees signed:	Amount/lender:
Other costs (holidays/Christmas):	Other	Year/when due:
TOTAL MONTHLY EXPENDITURE (B)	TOTAL LIABILITIES (B)	
MONTHLY DISPOSABLE INCOME (A-B)	NET SURPLUS/DEFICIT (A-B)	