ANNEX 2 STANDARD FINANCIAL STATEMENT

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

Please confirm you have considered (or discussed with an adviser) the use of any assets to make lump sum payments	Tick to confirm ✔ ☐

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	
(Income – 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	
Home and contents	
Utilities	
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)	
Savings	

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*

Version 1.0

Debts

Priority Debts

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

Summary version

STANDARD FINANCIAL STATEMENT

Debts *(continued)*

Priority Debts

Creditor	Owed (£)	Offer

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*

This financial statement is an accurate record of the information provided.

Signed: **Date:**

Version 1.0

Reproduced with permission of the Money Advice Service