

Client(s) name(s)	
Case Reference	
Date	

Income		
(Please show whether weekly, fortnightly or monthly in each case)	Now	For Adviser's use
Wages/Salary		
1 Client's earnings (net)		
2 Partner's earnings (net)		
3 Other earnings (net)		
4 Total Wages/Salary		
Other Income		
5 Maintenance/Child Support		
6 Boarders/Lodgers etc		
7 Student Loan		
8 Student Grant		
9 Other		
10 Total Other Income		
Pensions		
11 Client		
12 Partner		
13 Other (War, Annuity, Retirement etc)		
18 Total Pensions		
Benefits		
19 Attendance Allowance		
20 Child/One Parent Benefit		
21 Council Tax Benefit		
22 Disability Living Allowance		

23 Child Tax Credit		
24 Working Tax Credit		
25 Housing Benefit		
26 Incapacity Benefit		
27 Income Support		
28 Industrial Disablement Benefit		
29 Carers' Allowance		
30 Maternity Allowance		
30(a) Jobseekers Allowance		
30(b) Statutory Maternity Pay		
30(c) Statutory Sick Pay		
30(d) Bereavement Benefit		
31 Total Benefits		
32 TOTAL INCOME (4+10+18+31)		

Assets	
House/Flat	
33 Estimated current value	
34 Mortgages outstanding	
35 Equity (33-34)	
Car/Motorbike	
36 Estimated current value	
37 HP/Cond Sale outstanding	
38 Net value (36-37)	
Savings or saving schemes	
39 TESSA	
40 Higher Rate Deposit	
41 Building Societies	
42 Other	
Total Savings or saving schemes	
Please list any other assets or opportunities for lump sum payments which you may wish to use in repaying debts, for example savings accounts, bonuses, etc:	
Item	Value
Total Assets	

Expenditure – please show if weekly, fortnightly or monthly in each case

	How much do you pay?	For Adviser's use		How much do you pay?	For Adviser's use
Housing Costs:			Other Important Items:		
43 Rent			64 Court Fines/Orders		
44 Mortgage			65 Maintenance/Child Support		
45 Other Secured Loans			66 Pension/AVC payments		
46 Council Tax			67 Other Life Assurance		
Other Housing Costs:			68 HP/Conditional Sale		
47 Mortgage Protection Premium			69 TV Licence		
48 Ground Rent & Service Charges			70 Telephone		
49 Contents Insurance			71 Mobile Phone		
50 Building Insurance			72 Total Other important items (64→71)		
51 Mortgage Endowment			Travel:		
52 Other Life Assurance			73 Work		
53			74 School		
54			75 Shopping		
55 Total Other Housing Costs (47→54)			76 Other fares		
Utilities:			77 Road Tax		
56 Gas			78 Insurance		
57 Electricity			79 Fuel/Oil		
58 Water			80 MOT/Maintenance		
59 Coal			81 Breakdown/Recovery		
60 Oil/Paraffin			82 Parking Charges / Tolls		
61 Calor Gas			83		
62			84		
63 Total Utilities (56→62)			85 Total Travel (73→84)		

Housekeeping:			Repairs & Maintenance:		
86 Food/Milk			109 Repairs		
87 Cleaning/Toiletries			110 Household Maintenance		
88 Newspapers/Magazines			111 Window Cleaning		
89 Cigarettes/Tobacco/Sweets			112 Maintenance Contracts		
90 Alcohol			113 Total Repairs/Maintenance (109→112)		
91 Laundry/Dry Cleaning			Other Expenditure:		
92 Clothing/Footwear			114 Membership/Professional subs		
93			115 Postage		
94			116 Hairdressing/Haircuts		
95 Total Housekeeping (86→94)			117 TV/Video/Sat/Cable		
Children:			118 Other Appliance rentals		
96 Childcare			119 Pub/Outings		
97 Nappies/Baby items			120 Lottery		
98 School Fees			121 Hobbies (eg gardening etc)		
99 School Meals			122 Religious & charitable giving		
100 Pocket Money			123 Gifts (eg Christmas, Birthdays)		
101 Total Children (96→100)			123(a) Student Course Costs/Fees		
Health:			123(b) Student Tuition Fees		
102 Dentist/Prescriptions/Glasses			124 Total Other Expenditure (114→123)		
103 Care costs (other than childcare)			125 TOTAL EXPENDITURE (43+44+45+46+55+63+72+85+95+ 101+105+108+113+124)		
104 Health Insurance					
105 Total Health (102→104)					
Pets:					
106 Pet Food					
107 Vets' bills/Pet insurance					
108 Total Pets (106→107)					

CREDITOR SHEET 1 : PRIORITY DEBTS

Debt	Arrears (£)	Payment/ Offer (£)	Comments
Rent			
Mortgage			
Other Secured Loans			
Court Fines			
Council Tax			
Maintenance/Child Support			
Gas			
Electricity			
Other Utilities			
Total			
Available income for other creditors			

