

## Fact Sheet 7 – Income and Expenditure

### SFS data entry

Name: \_\_\_\_\_

D.O.B: \_\_\_\_\_

Application:  Single  Joint

Partner (if applicable): \_\_\_\_\_

Partner D.O.B (if applicable): \_\_\_\_\_

Address: \_\_\_\_\_

Contact/team name: \_\_\_\_\_

Agency: \_\_\_\_\_

Agency address: \_\_\_\_\_

Dependent children: under 16: \_\_\_\_\_ 16-18: \_\_\_\_\_

Other dependants: \_\_\_\_\_

Number in household: \_\_\_\_\_

Number of vehicles in household: \_\_\_\_\_

Housing tenure: (please indicate below)

Owner	Tenant-private
Mortgage	Living with parents
Tenant-social	Other

Membership code number: \_\_\_\_\_

Case reference number: \_\_\_\_\_

Date of statement: \_\_\_\_\_

Date of review (if applicable): \_\_\_\_\_

Employment: (please indicate below)

Full-time	Self-employed
Part-time	Retired
Unemployed	Student
Carer	Other
Not working due to illness/disability	

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

Partner's Employment (please indicate below)

Full-time	Self-employed
Part-time	Retired
Unemployed	Student
Carer	Other
Not working due to illness/disability	

Overview	Amount (£)	Notes
Total income		
Total outgoings		
(Income- outgoings)		
(Savings contribution)		
Debt admin fee (if applicable)		
<b>Total available for priority creditors</b>		
<b>Total available for non-priority creditors</b>		

Monthly income		
Earnings	Amount (£)	Notes
Salary or wages (take home)		
Partner salary or wages (take home)		

Other earnings (including self-employment)		
<b>Total salary and wages per month</b>		

<b>Benefits and tax credits</b>	<b>Amount (£)</b>	<b>Notes</b>
Universal credit		
Jobseeker's Allowance (income based)		
Jobseeker's Allowance (contribution based)		
Income Support		
Working Tax Credit		
Child Tax Credit Child Benefit		
Employment and Support Allowance or Statutory Sick Pay		
Disability benefits		
Carer's Allowance		
Local Housing Allowance/ Housing Benefit		
Council Tax Support		
Other benefits/ tax credit (e.g. maternity benefits)		
<b>Total benefits and tax credits per month</b>		

<b>Pensions</b>	<b>Amount (£)</b>	<b>Notes</b>
State pensions		
Private or work pensions		
Pension credit		
Other pensions		
<b>Total pensions per month</b>		

<b>Other Income</b>	<b>Amount (£)</b>	<b>Notes</b>
Maintenance or child support		
Boarders or lodgers		
Non-dependants' contributions		
Student loans and grants		
Other income		
<b>Total other income per month</b>		

<b>Monthly Outgoings: Fixed Costs</b>		
<b>Home and contents</b>	<b>Amount (£)</b>	<b>Notes</b>
Rent		
Ground rent & service charges (factor fees if you live in Scotland)		
Mortgage		
Mortgage endowment		
Secured loans		
Council Tax/rates (including water charge if you live in Scotland and rate in NI)		
Appliance & furniture rental (including appliance and furniture HP, conditional sale and so on)		
TV licence		
Other costs		
<b>Total home &amp; contents cost per month</b>		

<b>Utilities</b>	<b>Amount (£)</b>	<b>Notes</b>
Gas		
Electricity		
Other Costs		

(including coal, oil, calor gas and so on)		
Other Expenditures		
<b>Total utilities costs per month</b>		

<b>Water</b>	<b>Amount (£)</b>	<b>Notes</b>
Water Supply		
Water Waste		
<b>Total water costs per month</b>		

<b>Care and health costs</b>	<b>Amount (£)</b>	<b>Notes</b>
Childcare costs		
Adult-care costs		
Child maintenance or child support		
Prescriptions and medicines		
Dentistry and opticians		
Other costs		
<b>Total care and health costs per month</b>		

<b>Transport and travel</b>	<b>Amount (£)</b>	<b>Notes</b>
Public transport (e.g. work, school, shopping)		
Hire Purchase or conditional sale vehicle		
Car insurance		
Road Tax		
MOT and ongoing maintenance		
Breakdown cover		
Fuel, parking and toll road charges		
Other costs (including taxis)		
<b>Total transport and travel costs per month</b>		

<b>School costs</b>	<b>Amount (£)</b>	<b>Notes</b>
School uniform		
After-school clubs and school trips		
Other costs		
<b>Total school costs per month</b>		

<b>Pensions and insurances</b>	<b>Amount (£)</b>	<b>Notes</b>
Pensions payments		
Life insurance		
Mortgage payment protection insurance		
Building and contents insurance		
Health insurance (medical or accident or dental)		
Other		
<b>Total pensions and insurance costs per month</b>		

<b>Professional costs</b>	<b>Amount (£)</b>	<b>Notes</b>
Professional courses		
Union fees		
Professional Fees		
Other		
<b>Total professional costs per month</b>		

<b>Other essential costs</b>	<b>Amount (£)</b>	<b>Notes</b>
Other essential costs		

<b>Total other essential costs per month</b>		

### Monthly Outgoings: Flexible Costs

Communications and leisure	Amount (£)	Notes
Home phone, internet, TV packages (including film subscriptions)		
Mobile phone		
Hobbies, leisure or sport (e.g. socialising, eating out, outing, clubs, leisure courses)		
Gifts (e.g. birthdays, festivals, charity donations)		
Pocket money		
Newspapers, magazines, stationery and postage		
Other costs		
<b>Total communications and leisure costs per month</b>		

Food and housekeeping	Amount (£)	Notes
Groceries (e.g. food, pet food, non-alcoholic drinks, cleaning)		
Nappies and baby items		
School meals and meals at work		
Laundry and dry cleaning		
Alcohol		
Smoking products		
Vets bills & pet insurance		
House repairs and maintenance		
Other costs		
<b>Total food and housekeeping costs per month</b>		

Personal Costs	Amount (£)	Notes
Clothing and footwear		
Hairdressing		
Toiletries		
Other costs		
<b>Total personal costs per month</b>		

### Total Monthly Outgoings: (fixed and flexible)

	<b>Amount (£)</b>
<b>Total costs per month</b>	

### Savings

	Amount (£)
Please confirm that a monthly contribution to savings has been considered (or discussed with an adviser)	Tick to confirm <input type="checkbox"/>





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

**Signed:**

**Date:**