

Larkbridge Mortgages - Confidential Budget Questionnaire

MONTHLY EXPENDITURE - COMMITTED OUTGOINGS			
Regular household outgoings	Self	Partner	Joint
Rent/Mortgage	£	£	£
Repaying any remaining credit / store card debts	£	£	£
Loan / HP payments	£	£	£
Maintenance / child support agency payments	£	£	£
Other committed outgoings, e.g. mortgages on other properties, clearing CCJs, etc.	£	£	£
Utility bills (gas/electricity/water)	£	£	£
Council Tax	£	£	£
Telephone / mobile / internet / TV licence & any related monthly subscriptions e.g. Sky	£	£	£
Car insurance/road tax/servicing	£	£	£
Petrol / public transport	£	£	£
Supermarket shopping (food etc)	£	£	£
Clothes / shoes / beauty treatments	£	£	£
Professional Fees & Membership Subscriptions	£	£	£
Pension, investment & savings plan premiums	£	£	£
Protection / health insurance premiums	£	£	£
Household insurance (buildings and contents)	£	£	£
Any other insurance premiums (e.g. utilities, pet, travel)	£	£	£
Dependents (children and others)			
Personal expenditure on dependents, e.g. school fees, music lessons, child-care, nursing, clothing, presents, etc	£	£	£

MONTHLY EXPENDITURE - DISCRETIONARY OUTGOINGS

	Self	Partner	Joint
Other regular spending			
Domestic help (cleaner/gardener etc)	£	£	£
Holidays/entertainment nights out	£	£	£
Subscriptions e.g. Gym, club memberships, hobbies	£	£	£
ANY other items not covered elsewhere	£	£	£
Total projected monthly spending (Total Ex)	£	£	£

Total monthly net income	£
Total projected monthly spending (Total Ex)	£
Sum remaining to meet your commitments If your bank account doesn't show this surplus each month - Where has it gone? Go back to your list and ensure you include ALL of your spending in "ANY other items".	£

Revised income following *death or *retirement (*delete as applicable)	£
Expenditure from above that will cease on *death or *retirement (*delete as applicable)	£
Total revised monthly spending	£
Sum remaining to meet your commitments - be realistic.	£

Likely items of major expenditure in the next 5 years and their cost: