

INCOME & ASSETS SHEET

This sheet should not be sent to creditors

5 September 2019

Caseworker	
CASE Ref	
Client Name	

INCOME

Salary or wages

- 1 Client's salary or wages (take home)
- 2 Partner's salary or wages (take home)
- 3 Other income
- 4 Other Income

Monthly Total Salary / Wages

£ Amount	W/M/Q/A	Notes
	M ▼	
	M ▼	
	M ▼	
	M ▼	
0.00		

Other income

- 5 Maintenance or child support
- 6 Boarders or Lodgers
- 7 Non-dependant contributions
- 8 Student loans and grants
- 9 Other

Monthly Total Other Income

£ Amount	W/M/Q/A	Notes
	W ▼	
	W ▼	
	W ▼	
	A ▼	
	M ▼	
0.00		

Benefits

- 10 Jobseeker's Allowance (Income-based)
- 11 Jobseeker's Allowance (Contribution-based)
- 12 Income Support
- 13 Working Tax Credit
- 14 Child Tax Credit
- 15 Child Benefit
- 16 Incapacity Benefit / Statutory Sick Pay
- 17 Disability Living Allowance/Attendance Allowance
- 18 Carer's Allowance
- 19 Housing Benefit
- 19a Council Tax Benefit
- 20 Other (e.g. Maternity Allowance/SMP, etc)
- 21 Other

Monthly Total Benefits

£ Amount	W/M/Q/A	Notes
	W ▼	
	W ▼	
	W ▼	
	W ▼	
	M ▼	
	M ▼	
	W ▼	
	W ▼	
	W ▼	
	W ▼	
	A ▼	
	W ▼	
	W ▼	
0.00		

Pensions

- 22 State pension(s)
- 23 Private or work pension(s)
- 24 Pension Credit
- 25 Other

Monthly Total Pensions

Monthly Total Income

£ Amount	W/M/Q/A	Notes
	W ▼	
	M ▼	
	W ▼	
	M ▼	
0.00		
0.00		

ASSETS OR EQUITY

House or flat

- 26 Total value of property(ies)
- 27 Mortgage outstanding
- 28 Secured loan(s) outstanding

Total Equity

£ Amount	Notes
0.00	

Other assets

- 29 Value of vehicle(s) (less HP outstanding)
- 30 Savings
- 31 Other assets

Total Other Assets

Total Assets and Equity

£ Amount	Notes
0.00	
0.00	

Please confirm you have discussed the use of any assets to make up lump sum payments.

 Yes

EXPENDITURE SHEET

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EXPENDITURE

Essential Expenditure

32	Rent
33	Ground rent and service charges
34	Mortgage
35	Other secured loans
36	Mortgage Endowment and MPPI
37	Building and contents insurance
38	Pension and life insurance
39	Council Tax
40	Gas
41	Electricity
42	Water
43	Other utilities (coal, oil, calor gas)
44	TV licence
45	Magistrates' court fines
46	Maintenance or child support
47	Hire Purchase / conditional sale
48	Childcare costs
49	Adult care costs
50	Other
51	Other
52	Other
Monthly Total Essential Expenditure	

£ Amount	W/M/Q/A	Notes
	M	
	M	
	M	
	M	
	M	
	M	
	M	
	A	
	M	
	M	
	M	
	Q	
	M	
	W	
	M	
	M	
	W	
	M	
	M	
	M	
	M	
0.00		

Phone

53	Home phone
54	Mobile phone
55	Other
Monthly Total Phone	

£ Amount	Notes
	M
	M
	W
0.00	

Travel

56	Public transport (work, school, shopping etc)
57	Other (e.g. taxis)
58	Car insurance
59	Road tax
60	Fuel (Petrol, Diesel, Oil etc)
61	MOT and car maintenance
62	Breakdown or recovery
63	Parking charges or tolls
64	Other car costs
Monthly Total Travel	

£ Amount	Notes
	M
	W
	M
	A
	M
	A
	A
	W
	W
0.00	

EXPENDITURE SHEET

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Housekeeping

- 65 Food and milk
- 66 Cleaning and toiletries
- 67 Newspapers and magazines
- 68 Cigarettes and tobacco
- 69 Alcohol
- 70 Laundry and dry cleaning
- 71 Clothing and footwear
- 72 Nappies and baby items
- 73 Pet food
- 74 Other

Monthly Total Housekeeping

£ Amount	W/M/Q/A	Notes
	W	
	M	
	W	
	W	
	W	
	W	
	M	
	M	
	W	
	W	
0.00		

Other Expenditure

- 75 Health (dentist, glasses, prescriptions, health ins)
- 76 Repairs / house maint (incl window cleaning, maint contracts)
- 77 Hairdressing / haircuts
- 78 Cable, Satellite and Internet
- 79 TV, video and other appliance rental
- 80 School meals and meals at work
- 81 Pocket money and school trips
- 82 Lottery and pools etc
- 83 Hobbies / leisure / sport (incl pub/outings, gym etc)
- 84 Gifts (Christmas, birthdays, charity etc)
- 85 Vet bills and pet insurance
- 86 Other (e.g. postage)
- 87 Net Flix

Monthly Total Other Expenditure

Monthly Total Expenditure

Monthly Total Available for Creditors

£ Amount	W/M/Q/A	Notes
	M	
	M	
	M	
	M	
	W	
	W	
	W	
	W	
	W	
	W	
	M	
	M	
	M	
	W	
0.00		
0.00		
0.00		

Expenditure Notes / Reason(s) for Indebtedness

