

INCOME & EXPENDITURE

Client name: _____

Income	Monthly (net)	Monthly (gross)	Year (net)	Year (gross)
Salary / wages				
Dividends				
Pension				
Rental				
Savings & investments				
Maintenance				
Benefits				
Other				
TOTAL INCOME				

Expenditure	Monthly	Year
Mortgage / rent		
Debts (credit cards / loans / car finance)		
Council tax		
Utilities (gas / electric / water)		
Telephone / mobile		
TV & internet		
Food / day-to-day		
Travel (car / tax / fuel / annual services / other transport)		
Insurances (life / home / car)		
Childcare		
Leisure (subscriptions / meals out / hobbies / entertainment)		
Clothing		
Holidays		
Savings		
Pensions		
Other		
TOTAL EXPENDITURE		

