

Budget Planner

Estimated future expenditure analysis

Net Monthly Income

Net Monthly Income App 1

Income after Tax

Retirement/Pension income

Other income

£

£

£

Net Monthly Income App 2

Income after Tax

Retirement/Pension income

Other income

£

£

£

Household bills

Mortgage / Rent

Ground Rent / Service Charge

Council Tax

Electricity / Gas / Oil / Water

Buildings & Contents Insurance

Cleaner / Window cleaner / Gardener

TV Licence

Phones, including mobile

Satellite / Digital TV / Internet / Broadband

£

£

£

£

£

£

£

£

£

Household Bills Subtotal

£

Living Costs

Groceries

Toiletries / Medicines

Clothing

Cigarettes / Tobacco / Alcohol (at home)

Hairdresser

Eye / Dental / Hearing care

Household goods eg furniture, appliances

£

£

£

£

£

£

£

Living Costs Subtotal

£

Finance & Insurance

Life / Health Insurance

Bank charges

Loan repayments including Car Finance & Hire Purchase

Credit / Store Card / Catalogue payments

£

£

£

£

Finance & Insurance Costs Subtotal

£



SECURED FUTURES
TAILORED MORTGAGE & PROTECTION ADVICE

Mortgage Services

Budget Planner

Estimated future expenditure analysis

Family & Friends

Pet Food / Pet Insurance	£
Birthday / Christmas presents	£
Maintenance / Child support	£
Support for other relatives	£
Family & Friends Costs Subtotal	£

Travel

Petrol / Diesel	£
Car Tax	£
MOT & Maintenance	£
Bus / Tube / Train fares / Rail Card	£
Breakdown Cover	£
Travel Costs Subtotal	£

Leisure

Hobbies	£
Eating out / Entertainment	£
Magazine / Newspaper / Subscriptions	£
Holidays & Travel Insurance	£
Charity donations	£
Leisure Costs Subtotal	£

Estimated future expenditure grand total £

Amount available for new mortgage requirements and to address any protection shortfalls £