

Monthly Income & Expenditure

Name(s)		
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Income			
Basic Salary	£	Total Income	£
Pension income	£	Total Expenditure Now	£
Other Income	£	Disposable Income Now	£
Partner's Salary	£	Total Expenditure in Retirement	£
Partner's Pension Income	£		
Partner's Other Income	£		
Total Income	£		

Expenditure	Monthly Expenditure Now	Monthly Expenditure in Retirement
1. Secured/Unsecured		
Mortgage/ Rent	£	£
Credit Cards	£	£
Loans	£	£
Finance/ Hire Purchase	£	£
Other	£	£
2. Housing		
Rates	£	£
Electricity	£	£
Gas/Water/Oil	£	£
TV Licence	£	£
Broadband/Home Phone/TV	£	£
Home Insurance	£	£
Other	£	£
3. Motoring		
Fuel	£	£
Insurance	£	£
Tax	£	£

Monthly Income & Expenditure Cont'd

Maintenance/Breakdown	£	£
Other	£	£
4. Personal		
Food/Housekeeping	£	£
Toiletries/Make up	£	£
Clothing	£	£
Holidays	£	£
Savings	£	£
Socialising/ Entertainment	£	£
Meals Out/Takeaways	£	£
Gym/Sports membership	£	£
Other	£	£
5. Professional		
Dental	£	£
Optician	£	£
Insurances	£	£
Nursery, School, Childcare	£	£
Other	£	£
Total	£	£

Additional Comments