



## Personal Financial Profile

**Please note** – when filling out this form please use the tab and arrow keys to move between the relevant fields. Ensure you do not use the return or enter keys.

### 1. Personal details

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other ☐   
(please specify)

First name

Middle name(s)

Surname

Date of birth  (DD/MM/YYYY)

Address line 1

Address line 2

Address line 3

Address line 4 OR overseas country

Postcode

Residential status Homeowner ☐ Renting ☐ Living with parents ☐ Other ☐

Relationship status Single ☐ Living with partner ☐ Married/In a civil partnership ☐  
Widowed/Surviving civil partner ☐ Divorced/Dissolved/Separated ☐

Occupation (to be completed where principal in salaried employment)

Name of employer

Gross annual salary £  Date employment commenced

### 2. Spouse/Partner details

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other ☐   
(please specify)

First name

Middle name(s)

Surname

Date of birth  (DD/MM/YYYY)

Occupation

Name of employer

Gross annual salary £  Date employment commenced

### 3. Monthly income and expenditure breakdown

Income		Expenditure	
Net drawings/salary	£ <input type="text"/>	Mortgage/Rent	£ <input type="text"/>
Spouse/Partner's net salary	£ <input type="text"/>	Life assurance/Pension	£ <input type="text"/>
State benefits (e.g. child benefit)	£ <input type="text"/>	General/Domestic	£ <input type="text"/>
Investment income	£ <input type="text"/>	Council tax payments	£ <input type="text"/>
Other regular income	£ <input type="text"/>	Other expenditure	£ <input type="text"/>
<b>Total monthly income</b>	<b>£ <input type="text"/></b>	<b>Total monthly expenditure</b>	<b>£ <input type="text"/></b>

### 4. Other personal liabilities – whether taken solely in your name or jointly with others, but excluding mortgage(s). All credit and store cards to be entered here.

Name of lender/Source of finance	<input type="text"/>		
Type of loan/funding (e.g. HP/leasing)	<input type="text"/>		
Amount outstanding	£ <input type="text"/>	Monthly instalments	£ <input type="text"/>
Credit limit (if applicable)	£ <input type="text"/>	Final repayment year (if applicable) (YYYY)	<input type="text"/>

Name of lender/Source of finance	<input type="text"/>		
Type of loan/funding (e.g. HP/leasing)	<input type="text"/>		
Amount outstanding	£ <input type="text"/>	Monthly instalments	£ <input type="text"/>
Credit limit (if applicable)	£ <input type="text"/>	Final repayment year (if applicable) (YYYY)	<input type="text"/>

**Total monthly instalments** £

### 5. Personal guarantees – provide details of any other guarantee obligations

Who was the guarantee granted for?	<input type="text"/>
Purpose of the guarantee	<input type="text"/>
Amount	£ <input type="text"/>

### 6. Personal assets – please complete the details below

#### 6.1 Main residence

Date Purchased (xx/xx/xxxx)	<input type="text"/>	Purchase Price	£ <input type="text"/>
Estimated present value	£ <input type="text"/>	Mortgage outstanding	£ <input type="text"/>
The property is owned:	Solely <input type="checkbox"/> <b>OR</b> Jointly <input type="checkbox"/>	Is the property let?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Name of lender(s)	<input type="text"/>		
Term remaining	<input type="text"/>		

## 6.2 Other property (1)

Date Purchased (xx/xx/xxxx)	<input type="text"/>	Purchase Price	£	<input type="text"/>		
Estimated present value	£	<input type="text"/>	Mortgage outstanding	£	<input type="text"/>	
The property is owned:	Solely <input type="checkbox"/>	OR	Jointly <input type="checkbox"/>	Is the property let?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Name of lender(s)	<input type="text"/>					
Term remaining	<input type="text"/>					

## 6.3 Other property (2)

Date Purchased (xx/xx/xxxx)	<input type="text"/>	Purchase Price	£	<input type="text"/>		
Estimated present value	£	<input type="text"/>	Mortgage outstanding	£	<input type="text"/>	
The property is owned:	Solely <input type="checkbox"/>	OR	Jointly <input type="checkbox"/>	Is the property let?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Name of lender(s)	<input type="text"/>					
Term remaining	<input type="text"/>					

## 7. Other personal assets – provide the estimated present value of the following assets, do not include business assets.

Cash deposits	£	<input type="text"/>
Name of Bank/Building Society	<input type="text"/>	
Other (Shares/Life Cover/Endowments)	£	<input type="text"/>