

Expenditure Questionnaire



Strictly Private & Confidential

Client

For official use only

Client Reference

Investment Manager

Financial Planner

Important: Please use ANNUAL figures.

Current Lifestyle - The purpose of this column is to help you identify your present standard of living. It is important to list the annual figures as accurately as possible as they will be used to establish whether currently your income exceeds your expenditure - and if so, by how much.

Survivor's Lifestyle - The annual figure entered under this heading should indicate your partner and children's likely cost of living, had you died yesterday.

Please complete this questionnaire as comprehensively as possible. The more we know about you the better placed we'll be to provide you with the best possible advice.

Personal Details	You	Your Spouse/Partner
Full Name	<input type="text"/>	<input type="text"/>

Housekeeping Expenses	Current Lifestyle	Survivor's Lifestyle
Electricity	<input type="text"/>	<input type="text"/>
Gas/Oil/Solid Fuel	<input type="text"/>	<input type="text"/>
Water Rates	<input type="text"/>	<input type="text"/>
Council Tax	<input type="text"/>	<input type="text"/>
Home Telephone	<input type="text"/>	<input type="text"/>
Repairs & Renewals	<input type="text"/>	<input type="text"/>
Garden/Gardener/Plants etc	<input type="text"/>	<input type="text"/>
Help in House	<input type="text"/>	<input type="text"/>
House & Contents Insurance	<input type="text"/>	<input type="text"/>
TV Licence	<input type="text"/>	<input type="text"/>
Sky/Digital TV/Satellite	<input type="text"/>	<input type="text"/>
Alarm	<input type="text"/>	<input type="text"/>
Internet	<input type="text"/>	<input type="text"/>
Housekeeping/Food etc	<input type="text"/>	<input type="text"/>
Wines & Spirits	<input type="text"/>	<input type="text"/>
Laundry & Dry Cleaning	<input type="text"/>	<input type="text"/>
Pet Foods	<input type="text"/>	<input type="text"/>
Holiday Home Expenses	<input type="text"/>	<input type="text"/>
Any Other Expenses	<input type="text"/>	<input type="text"/>
Total Housekeeping Expenses	£ <input type="text"/>	£ <input type="text"/>

Personal Expenses	Current Lifestyle	Survivor's Lifestyle
Own Clothing & Footwear	<input type="text"/>	<input type="text"/>
Partner's Clothing & Footwear	<input type="text"/>	<input type="text"/>
Cigarettes & Tobacco	<input type="text"/>	<input type="text"/>
Eating Out	<input type="text"/>	<input type="text"/>
Christmas & Birthday Presents	<input type="text"/>	<input type="text"/>
Holidays	<input type="text"/>	<input type="text"/>
Subscriptions (Excluding Road Recovery)	<input type="text"/>	<input type="text"/>
Sports/Hobbies	<input type="text"/>	<input type="text"/>
BUPA/PPP/WPA Health Insurance	<input type="text"/>	<input type="text"/>
Mobile Phones	<input type="text"/>	<input type="text"/>
CDs/Books/Newspapers	<input type="text"/>	<input type="text"/>
Other Misc. Spending Money	<input type="text"/>	<input type="text"/>
Gifts to Charities	<input type="text"/>	<input type="text"/>
Travelling expenses other than Motoring	<input type="text"/>	<input type="text"/>
Other Personal Expenses	<input type="text"/>	<input type="text"/>
Total Personal Expenses	£ <input type="text"/>	£ <input type="text"/>

Cost of Servicing Debt	Current Lifestyle	Survivor's Lifestyle
Mortgages/Loans		
Bank Charges		
Maintenance Payments		
Credit Cards		
Total Cost of Servicing Debt	£	£

Motoring Expenses	Current Lifestyle	Survivor's Lifestyle
Own Car Tax		
Own Car Insurance		
Petrol & Oil		
Servicing & Repairs		
Road Recovery (AA/RAC)		
Annual Depreciation		
Partner's Car Tax		
Partner's Car Insurance		
Partner's Petrol & Oil		
Partner's Servicing & Repairs		
Partner's Road Recovery (AA/RAC)		
Partner's Annual Depreciation		
Total Motoring Expenses	£	£

Investment & Life Assurance	Current Lifestyle	Survivor's Lifestyle
Life Assurance Premiums		
Bond & Endowment Premiums		
Pension Contributions		
Regular Saving in Building Society		
Regular Saving in ISAs etc		
Critical Illness Policy Regular Premiums		
Regular Saving in Other Investments		
Other Insurance		
Total Investment & Life Assurance	£	£

Professional Fees	Current Lifestyle	Survivor's Lifestyle
Accountant's Fees (non business)		
Dentist's Fees		
Doctor's Fees/Prescriptions		
Financial Planner's Fees		
Optician's Fees		
Osteopath/Chiro Fees		
Veterinary Surgeon's Fees		
Total Professional Fees	£	£

