Large Loan Expenditure & Assets Form

This document must be submitted in addition to the customer's latest 3 months main current account bank statements.
Information must be supplied for all the items listed below. If Council Tax, Utilities and Telephones/ TV are not listed in the customer's bank statements please provide.

Essential Expenditure

	Applicant 1 or Shared	Applicant 2	Monthly / Quarterly / Annual
Insurances (Car, House, Pets, Health etc)			
Pension (if not deducted from salary)			
Food Shopping			
Public Transport			
Fuel (Petrol / Diesel)			
Other Essential Spending (List those not already captured in the mortgage sales system or not listed on the customer's bank statements e.g. Council Tax, Utilities and Telephones/TV)			

Discretionary Spending

	Applicant 1 or Shared	Applicant 2	Monthly / Quarterly / Annual
Regular Savings			
Leisure (Eating out, cinema, socialising etc)			

Savings & Assets (Gross Value)

	Applicant 1 or Shared	Applicant 2	Monthly / Quarterly / Annual
Savings			
Investments (Shares, Bonds etc)			
Existing Residential Property			
Other Properties			