

Large loan – expenditure & assets.



If requested this document must be submitted together with:
 3 months bank statements for all applicants main current account(s)
 Multiple forms can be submitted if required

| | |
|----------------------------|---|
| Applicants surname: | |
| Case ID: | M |

| | Applicant responsible (or shared) | Amount | Frequency | Comments - additional information to be considered by Underwriting to support the application |
|--|-----------------------------------|--------|-----------|---|
| Pension contributions (not deducted from salary) | | | | |
| Food shopping | | | | |
| School fees | | | | |
| Childcare costs | | | | |
| Child / adult maintenance | | | | |

| Any type of other regular committed expenditure (not household spending or commitments already keyed) | Applicant responsible (or shared) | Amount | Frequency | Comments - additional information to be considered by Underwriting to support the application |
|---|-----------------------------------|--------|-----------|---|
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| Assets – Savings and investments | | | | | |
|----------------------------------|-------|-----------------|---------------|-------------|---|
| Type of savings / investment | Owner | UK based? (Y/N) | Current Value | Institution | Comments - additional information to be considered by Underwriting to support the application |
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| Assets – Property – owned outright / mortgaged / mortgage application in progress | | | | | | | |
|---|-----------------|--------------------------------|-----------------|--|--|------------------------|---|
| Address | Owner & % owned | Monthly rental (if applicable) | Estimated Value | Ongoing mortgage balance (if applicable) | Ongoing mortgage payment (if applicable) | Lender (if applicable) | Comments - additional information to be considered by Underwriting to support the application |
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