

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.
- * = Please provide costs for new property if moving.

| | Detail of Spend/Assets | APP 1 or Shared | APP 2 or Shared | Monthly/Quarterly/ Annually | Comments which will help the underwriter understand the spend/asset |
|---|------------------------|-----------------|-----------------|--------------------------------|---|
| 1. Essential Expenditure | | | | | If comments exceed these spaces, please put additional information in the box overleaf. |
| Car Insurance | | | | | |
| Road Tax | | | | | |
| Insurance (excluding car) | | | | | |
| House* | | | | | |
| Pet | | | | | |
| Health | | | | | |
| Other | | | | | |
| Pension (If not deducted from salary) | | | | | |
| Food Shopping | | | | | |
| Public Transport | | | | | |
| Fuel (Petrol/Diesel) | | | | | |
| Council Tax* | | | | | |
| Water Rates* | | | | | |
| Utilities* | | | | | |
| Telephone/TV/Cable/Broadband* | | | | | |
| Childcare Costs | | | | | |
| Maintenance Costs | | | | | |
| School Fees | | | | | |
| Other Essential Spending (Please give details and itemise) | | | | | |
| Other Spend 1 | | | | | |
| Other Spend 2 | | | | | |
| Other Spend 3 | | | | | |
| Other Spend 4 | | | | | |
| Other Spend 5 | | | | | |

Continued overleaf

| | Detail of Spend/Assets | APP 1 or Shared | APP 2 or Shared | Monthly/Quarterly/ Annually | Comments which will help the underwriter understand the spend/asset |
|--|------------------------|-----------------|-----------------|--------------------------------|---|
| 2. Regular Discretionary Spending | | | | | |
| Regular Saving | | | | | |
| Leisure (Eating out, Cinema etc) | | | | | |
| Membership Fees (e.g. gym, sporting season tickets etc) | | | | | |
| 3. Assets (Gross Value) | | | | | |
| Savings | | | | | |
| Investments | | | | | |
| Shares | | | | | |
| Bonds | | | | | |
| Other | | | | | |
| Existing Residential Properties | | | | | |
| Other Properties (Value of each property) | | | | | |
| Property 1 | | | | | |
| Property 2 | | | | | |
| Property 3 | | | | | |
| Property 4 | | | | | |

Additional comments