

PERSONAL ASSET AND LIABILITY STATEMENT



Name

Where assets/liabilities are jointly held, please asterisk(*)

PRIVATE DWELLING

Address Value £

Lender

Account Number Monthly Payment £ O/s mortgage £

CASH RESOURCES

Bank/Building Society Account Number Amount £

Bank/Building Society Account Number Amount £

STOCKS AND SHARES (quoted)

Company Number of Shares Value £

Company Number of Shares Value £

LIFE POLICIES

Company Policy Number Surrender Value £

Company Policy Number Surrender Value £

OTHER INCOME/ASSETS

OTHER BORROWING/LIABILITIES (Including Guarantees)

(Please quote purposes, lender, term and repayments)

We hereby certify that this is a true and accurate record of our assets and liabilities.

Signature(s) (dd / mm / yy) (dd / mm / yy)
1. Date: / / 2. Date: / /

If you own any investment properties please complete the schedule on the reverse of this form. Please ensure all properties owned are detailed.

FOR OFFICE USE ONLY

Total Assets (Excluding rent) £

Total Liabilities £

