

Budget Planner



Name: _____

Account Number: _____

A. Monthly Income	
Wages (include any regular overtime/bonuses)	£
Partner's wages (include any regular overtime/bonuses)	£
Child Benefit/Universal Credit	£
Tax Credits	£
Income Support or Tax Credit	£
Jobseekers Allowance	£
Maintenance	£
Retirement or works pension	£
Contributions from others in the household	£
Other 1: _____	£
Other 2: _____	£
A. Total Income	£

B. Everyday Monthly Expenses and Priority Bills	
Mortgage / Rent	£
Shared Ownership Rent	£
Ground rent or service charge	£
Second mortgage or other secured loan	£
Endowment Policy / Life insurance	£
Council Tax	£
Electricity	£
Gas or other fuel	£
Water charges	£
Phone / mobile phone charges	£
Household insurance	£
TV rental and licence	£
Car tax and insurance	£
Travelling expenses e.g petrol / public transport	£
Housekeeping (food and Toiletries)	£
Prescriptions and health costs	£
Clothing	£
School meals / meals at work	£
Childminding / childcare	£
Maintenance payments	£
Court fines	£
Pension contributions	£
Hire purchase (car, motorcycle etc)	£
Other 1: _____	£
Other 2: _____	£
Other 3: _____	£
B. Total Spending	£

C. Priority Debt Arrears		
	Total Outstanding	Monthly Repayment
Mortgage	£	£
Shared Ownership rent arrears	£	£
Second mortgage or secured loan arrears	£	£
Council tax arrears	£	£
Electricity arrears	£	£
Gas arrears	£	£
Court fine arrears	£	£
Maintenance arrears	£	£
Hire purchase arrears	£	£
Other 1: _____	£	£
Other 2: _____	£	£
C. Total amount being repaid each month	£	£

D. Unsecured Debts			
	Creditor	Balance Owed	Monthly Repayment
1		£	£
2		£	£
3		£	£
4		£	£
5		£	£
6		£	£
7		£	£
8		£	£
9		£	£
10		£	£
11		£	£
12		£	£
D. Total monthly repayments			£

Number of people in my household	
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This is an accurate record of my financial position

Signed:	
Date:	