

# Financial Planner

We suggest you work out your total income and expenses to either a monthly or weekly basis.

Expenses	You	Partner
<b>Regular Bills</b>		
Council Tax		
Electricity		
Gas		
Rent/Mortgage Payments		
Water Rates		
Telephone		
TV Licence		
Other rental		
House insurance		
Motor Insurance		
Medical Insurance		
Life Assurance		
Pension Contributions		
<b>Bank Charges</b>		
Service Charges		
Interest Paid		
<b>Child Care</b>		
<b>Cash Withdrawals</b>		
<b>Clothing</b>		
<b>Charity Donations and Gifts</b>		
<b>Education</b>		
Books		
Fees		
<b>Food</b>		
Groceries		
Dining Out		
<b>Holidays</b>		
Accommodation		
Travel		
<b>Leisure</b>		
<b>Loans Repayments</b>		
Credit Card		
Hire Purchase		
<b>Travel Expenses</b>		
Car Maintenance		
Petrol		
Rail/Bus fares		
<b>Miscellaneous</b>		
Subscriptions		
<b>Total</b>		

Income	You	Partner
<b>Wages and Salary net of tax</b>		
Bonus and Commission		
Overtime		
Self-Employed/Partnership Drawings		
<b>Other Income</b>		
Income support		
Unemployment Benefit		
Investment Income		
<b>Total</b>		

Surplus/Over spend?

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**Debts and Liabilities**

- Mortgage
- Student Loans
- Bank Loans
- Bank Overdraft
- Loans from others
- Credit Cards

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Value of House

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Age of children if at home

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**Any Comments**

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Details of debts - amount owed and to whom.


