

Last Updated: June 2020

Client Name(s): Date:

Address: Tel:

Total Expenditure Breakdown: Now and in Retirement (per month)

Essential	Now	In retirement (estimated)
Mortgage		
Rent		
Council tax		
Gas		
Electricity		
Water		
Telephone		
Tv / Satellite / Internet		
Maintenance		
Food		
Car / Travel expenses		
Life / General assurance premium		
School fees		
Living expenses		
Loans and credit cards		
Other		
SUBTOTAL		

Discretionary	Now	In retirement (estimated)
Gym		
Holidays		
Entertainment		
Other		
SUBTOTAL		
TOTAL MONTHLY OUTGOINGS		

How much is owed on:

Liabilities	Now	In retirement (estimated)
Mortgage		
Loans		
Overdrafts		
HP		
Other		
TOTAL		

Notes (Please provide as much detail as possible):

[Large empty area for notes]

Declaration

This information has been provided on the understanding that it will be used in strict confidence and that it places me/us under no obligation to take up any suggested recommendation.

SELF

PARTNER

Signature(s)

Date

Date

Completed by

(for Innes Reid)

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