## Budget Plan

Date:


## Personal Information:



## Account Details:

Account No.
Sort Code


| Contact telephone no's: | Preferred time <br> of day for contact: |
| :--- | :--- |
| Home $\square$ | $\square$ |
| Mobile $\square$ |  |
| Work $\square$ | $\square$ |

No. of adults in household
No. of dependants
Ages of dependants

## Personal Circumstances:

Please provide details of particular changes in your circumstances since you arranged the borrowing facilities detailed below which have led to you facing financial difficulties, e.g. loss of employment, serious illness:
$\square$

I expect my financial situation to improve: (please tick relevant box)
within the next 3 months
within the next 6 months
within the next 12 months not likely to change


## Borrowing \& Credit Facilities

(please enter amounts to the nearest whole $£$ )
Please detail all your current mortgages, loans (secured \& unsecured), credit cards \& HP agreements.

| Name of Provider | Type of Facility | Outstanding Balance | Current or Proposed Monthly Payment* | Amount of Arrears (if appropriate) |
| :---: | :---: | :---: | :---: | :---: |
| Barclays (if applicable) | Mortgage | £ | £ | £ |
| Account No. |  |  |  |  |
| Barclays (if applicable) | Loan | £ | £ | £ |
| Account No. |  |  |  |  |
| Barclays (if applicable) | Barclaycard | £ | £ | £ |
| Card No. |  |  |  |  |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  |  | £ | £ | £ |
|  | TOTAL | £ | £ | Carry forward this figure to the Expenditure table overleaf |

[^0]
## Key to frequency

W = weekly
$B=$ bi monthly
$\mathrm{F}=$ fortnightly
$\mathrm{Q}=$ quarterly
$M=$ monthly / 4 weekly
A = annually

Please convert all amounts to a monthly equivalent, e.g. to convert weekly to monthly multiply by 52, and then divide by 12 . Annual expenditure (e.g. car tax) can be divided by 12 to achieve a monthly equivalent.

Expenditure

|  | Amount \& Frequency | Monthly Equivalent |
| :---: | :---: | :---: |
| rent/board | £ | £ |
| service charge/ground rent | £ | £ |
| Other priority payments e.g. fines, CCJs | £ | £ |
| endowment/life ins/pension | £ | £ |
| home/contents insurance | £ | £ |
| Council Tax | £ | £ |
| water | £ | $£$ |
| gas/coal/oil | £ | £ |
| electricity | £ | £ |
| home phone/ internet | £ | £ |
| mobile phone (contract expires:) | £ | £ |
| food/housekeeping | £ | £ |
| school/work meals | £ | £ |
| pets/other <br> household | £ | £ |
| clothing | £ | £ |
| TV Licence/rental/ digital |  |  |
| Petrol |  |  |
| road tax |  |  |


|  | Amount \& Frequency | Monthly Equivalent |
| :---: | :---: | :---: |
| MOT/car maintenance/ breakdown cover |  |  |
| car insurance |  |  |
| other travel expenses (train fares, parking, etc) |  |  |
| entertainment/leisure |  |  |
| CSA/childcare/ maintenance |  |  |
| Caring for other dependants (elderly/disabled) |  |  |
| other |  |  |
| other |  |  |
| other |  |  |
| monthly commitment for bor | wing \& credit facilities (from page 1) | £ |
| Budget Plan - Mortgage Repay Total monthly expenditure (B) |  | £ |

Income
main income
partners/second income
state benefits
tax credits
other income
Total monthly income (A)

| Amount \& Frequency | Monthly Equivalent |
| :--- | :--- |
| $£$ | $£$ |
| $£$ | $£$ |
| $£$ | $£$ |
| $£$ | $£$ |
| $£$ | $£$ |
|  | $£$ |

## Declaration

I/we confirm that the information provided in this document is accurate to the best of my/our knowledge
Customer signature(s)
$\square$
$\square$
$\square$

Please provide as much detail as possible as this will help us when considering your proposals:
How much can you pay now? Please note your proposals for either the continued or any interim Mortgage repayment plan.
$\square$
Have you sought independent financial advice around your repayment proposals and the potential consequence of such an arrangement?
$\square$
Do you qualify for Income Support Mortgage Interest?
$\square$
$\square$
Other information for consideration (including details of any Savings) :
$\square$

## Signed:

$\square$

Signed:
$\square$


[^0]:    *This is the amount you are actually paying or proposing to pay (including any arrears if applicable)

