Budget Plan

Date:	M / Y Y Y Y		
Personal Information:		Personal Circumstances: Please provide details of particular changes in your	
Your Name(s)		circumstances since you arranged the borrowing facilities detailed below which have led to you facing financial difficulties, e.g. loss of employment, serious illness:	
Account Details: Account No.			
Sort Code			
Contact telephone no's:	Preferred time of day for contact:	I expect my financial situation to improve: (please tick relevant box)	
Home		within the next 3 months	
Mobile		within the next 6 months	
Work		within the next 12 months	
No. of adults in household		not likely to change	
No. of dependants			
Ages of dependants			

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

 $^{{}^*\}mathsf{This}$ is the amount you are actually paying or proposing to pay (including any arrears if applicable)



Key to frequency

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

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 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 borrowing & credit facilities (from page 1)			£
Budget Plan – Mortgage Repay Total monthly expenditure (B)		£	

Income

	Amount & Frequency		Monthly Equivalent
main income	£		£
partners/second income	£		£
state benefits	£		£
tax credits	£		£
other income	£		£
Total monthly income (A)			£
Summary			
Total monthly income (A)			£
Less total monthly expenditure (B)			£
Disposable income or shortfall (C)			£

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

'	,
Customer signature(s)	
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.
	epayment proposals and the potential consequence of such an
arrangement?	
Do you qualify for Income Support Mortgage Interest?	
20 you quaniy to meeting support meregage meetest.	

Do you have a Mortgage Protection Plan in place? Do you unde	rstand the circumstances in which you are able to make a claim?
Other information for consideration (including details of any S	Savings) ·
Care mornator or consideration (mercaning details or any s	, savings).
Signed:	Signed: