

**Personal Financial Planning –  
Supplementary Questionnaire**



**Ash-Ridge**

**Income and Expenses**

Client Names .....

**Gross Annual Income**

	Self	Partner	Joint
Main Employment			
Self-Employment			
Overtime, Commission, Bonuses			
Non Taxable Income/Benefits			
Rental Income			
State Pension			
Occupational Pension			
Other Pensions or Annuities			
Investment Bond Withdrawals			
Unit Trusts/OEICS Withdrawals			
ISA/Account Withdrawals			
Equities Withdrawals			
Yield and Dividends			
Interest			
Maintenance			
Child Benefit			
Trust Fund Payments			
Other ( please confirm source below)			
<b>Total Annual Income</b>			



## Gross Annual Expenditure

	Self	Partner	Joint
<b>Home and Other Properties Expenses</b>			
Rent			
Mortgage(s) and Other Property Loan(s)			
Ground Rent/Lease			
Council Tax			
Water Rates			
Buildings and Contents Insurance			
Gas, Electricity and Other Fuels			
Maintenance, Repairs, Decorating and Furniture			
Telephone, Mobile & Internet			
TV Licence			
Home Help, Housekeeper, Cleaner etc			
Gardening/Handyman			
Other			
<b>HP, Personal Loans, Credit Cards, Bank Charges</b>			
HP and Personal Loans			
Credit and Store Cards			
Bank Interest and Charges			
Other			
<b>Child Care and Expenses</b>			
Baby-sitter/Nanny			
Education Fees			
Matrimonial/Child Maintenance			
Children's Pocket Money and School Meals			
Other			
<b>Future Wealth Creation</b>			
Pension Contributions			
Investment Contributions			
Other Regular Savings			
Other			

## Gross Annual Expenditure Cont.

	Self	Partner	Joint
<b>Regular Insurance Premiums</b>			
Other Insurance Premiums			
Income Protection Insurance Premiums			
Other			
<b>Living Costs and Clothing</b>			
Food, Drink, Tobacco etc.			
Clothing, Footwear, Laundry and Dry Cleaning			
Personal Grooming and Cosmetics Other			
Other			
<b>Transport</b>			
Vehicle Lease Payment			
Vehicle Insurance			
Licence and Tax			
Fuel and Oil			
Vehicle Maintenance, Repairs, Cleaning			
AA/RAC etc.			
Vehicle Parking Fees			
Buses, Trains, Taxis			
Other			
<b>Leisure, Holidays and Entertainment</b>			
Recreation/Entertaining (Films, Meals Out etc.)			
Holidays			
Reading Material, Music, Videos etc.			
Club Dues, Sport, Hobbies, Betting etc.			
Other			

## Gross Annual Expenditure Cont.

	Self	Partner	Joint
<b>Gifts and Donations</b>			
Non Gift Aid Donations			
Gift Aid Donations			
Birthday, Christmas Gifts etc.			
Other			
<b>Professional Adviser Fees</b>			
Personal Accountant			
Personal Solicitor			
Other			
<b>Personal Discretionary</b>			
Miscellaneous			
<b>Total Expenditure Excluding Tax</b>			

<b>Tax/NIC For Tax Year 2018/19</b>			
Income Tax			
National Insurance Contributions			
Capital Gains Tax			
<b>Total Annual Expenditure</b>			

## Client Declaration

I/we confirm that the above information has been assessed as a fair account of my/our income and expenditure position at the current time.

<b>SIGNED</b>	<b>Client</b>	<b>Partner</b>
<b>DATED</b>		