



## **Expenses Questionnaire**

### **Confidential Financial Review**

**IMPORTANT:** PLEASE ENTER YOUR DATA DIRECTLY INTO THIS PDF

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Current Expenditure

Name:

Date Completed:

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Confidential Financial Review

Annual Expenditure Analysis Per Year

| Item                    | Amount  |        |
|-------------------------|---------|--------|
|                         | Monthly | Annual |
| Basic - Home            |         |        |
| Mortgage/rent           |         |        |
| Council tax             |         |        |
| Water                   |         |        |
| Electricity             |         |        |
| Gas                     |         |        |
| TV - Satellite          |         |        |
| Alarm Security          |         |        |
| Home telephone internet |         |        |
| Mobiles                 |         |        |
| Home insurance/contents |         |        |
| Food and housekeeping   |         |        |
| Cleaning                |         |        |
| Property maintenance    |         |        |
| Garden maintenance      |         |        |
|                         |         |        |
|                         |         |        |
| Sub-total               |         |        |

|                             |         |        |
|-----------------------------|---------|--------|
| Basic - Vehicles            | Monthly | Annual |
| Car depreciation or payment |         |        |
| Petrol/diesel               |         |        |
| Servicing and maintenance   |         |        |
| Car Insurance               |         |        |
| Car Other                   |         |        |
|                             |         |        |
|                             |         |        |
|                             |         |        |
| Sub-total                   |         |        |

| Item                      | Amount  |        |
|---------------------------|---------|--------|
|                           | Monthly | Annual |
| Basic - Personal          |         |        |
| Clothing                  |         |        |
| Wines/spirits alcohol     |         |        |
| Magazines - Subscriptions |         |        |
| Beauty/grooming           |         |        |
| Public transport/taxis    |         |        |
| Childcare                 |         |        |
| Cigarettes                |         |        |
| Charitable donations      |         |        |
| Gifts                     |         |        |
| Pets                      |         |        |
|                           |         |        |
|                           |         |        |
| Sub-total                 |         |        |

|                           |         |        |
|---------------------------|---------|--------|
| Basic - Medical           | Monthly | Annual |
| Private medical insurance |         |        |
| Dentist                   |         |        |
| Optician                  |         |        |
|                           |         |        |
|                           |         |        |
| Sub-total                 |         |        |

|             |         |        |
|-------------|---------|--------|
| Luxury      | Monthly | Annual |
| School Fees |         |        |
|             |         |        |
|             |         |        |
|             |         |        |
|             |         |        |
| Sub-total   |         |        |

Calculator

Enter monthly amount

Total per year

| Item                | Amount  |        |
|---------------------|---------|--------|
|                     | Monthly | Annual |
| Leisure             |         |        |
| Sports/hobbies      |         |        |
| Holidays and travel |         |        |
| Entertainment       |         |        |
| Eating out          |         |        |
| Cash withdrawals    |         |        |
|                     |         |        |
| Sub-total           |         |        |

|                                             |  |
|---------------------------------------------|--|
| Milestones - e.g World Cruise 2022 £30,000. |  |
|                                             |  |
|                                             |  |
|                                             |  |
|                                             |  |
|                                             |  |
| Sub-total                                   |  |

Totals

Basic

Leisure

Luxury

Grand Total

Advisors Note: Not currently importable.

Anticipated Expenditure

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Annual Expenditure Analysis Per Year

| Item                    | Amount  |        |
|-------------------------|---------|--------|
| Basic - Home            | Monthly | Annual |
| Mortgage/rent           |         |        |
| Council tax             |         |        |
| Water                   |         |        |
| Electricity             |         |        |
| Gas                     |         |        |
| TV - Satellite          |         |        |
| Alarm Security          |         |        |
| Home telephone internet |         |        |
| Mobiles                 |         |        |
| Home insurance/contents |         |        |
| Food and housekeeping   |         |        |
| Cleaning                |         |        |
| Property maintenance    |         |        |
| Garden maintenance      |         |        |
|                         |         |        |
|                         |         |        |
| Sub-total               |         |        |

| Basic - Vehicles            | Monthly | Annual |
|-----------------------------|---------|--------|
| Car depreciation or payment |         |        |
| Petrol/diesel               |         |        |
| Servicing and maintenance   |         |        |
| Car Insurance               |         |        |
| Car Other                   |         |        |
|                             |         |        |
|                             |         |        |
|                             |         |        |
| Sub-total                   |         |        |

| Item                      | Amount  |        |
|---------------------------|---------|--------|
| Basic - Personal          | Monthly | Annual |
| Clothing                  |         |        |
| Wines/spirits alcohol     |         |        |
| Magazines - Subscriptions |         |        |
| Beauty/grooming           |         |        |
| Public transport/taxis    |         |        |
| Childcare                 |         |        |
| Cigarettes                |         |        |
| Charitable donations      |         |        |
| Gifts                     |         |        |
| Pets                      |         |        |
|                           |         |        |
|                           |         |        |
| Sub-total                 |         |        |

| Basic - Medical           | Monthly | Annual |
|---------------------------|---------|--------|
| Private medical insurance |         |        |
| Dentist                   |         |        |
| Optician                  |         |        |
|                           |         |        |
|                           |         |        |
| Sub-total                 |         |        |

| Luxury      | Monthly | Annual |
|-------------|---------|--------|
| School Fees |         |        |
|             |         |        |
|             |         |        |
|             |         |        |
|             |         |        |
| Sub-total   |         |        |

Calculator

Enter monthly amount

Total per year

| Item                | Amount  |        |
|---------------------|---------|--------|
| Leisure             | Monthly | Annual |
| Sports/hobbies      |         |        |
| Holidays and travel |         |        |
| Entertainment       |         |        |
| Eating out          |         |        |
| Cash withdrawals    |         |        |
|                     |         |        |
| Sub-total           |         |        |

|                                             |  |
|---------------------------------------------|--|
| Milestones - e.g World Cruise 2022 £30,000. |  |
|                                             |  |
|                                             |  |
|                                             |  |
|                                             |  |
|                                             |  |
| Sub-total                                   |  |

Totals

Basic

Leisure

Luxury

Grand Total

Advisors Note: Not currently importable.