Financial Statement

Contact	Information	
Contact	Information	



Full Name	
stevensdrake reference	
Mobile telephone number	
Email address	
Home telephone number	
Work Telephone number	

Profiling	
Residential status (owner, rent, living with parents, lodger, etc.)	
Employment status (employed, not working, self-employed, etc.)	
Number of additional adults in the household	
Number of dependant children (under 16)	
Number of dependant children (16-18)	
Number of people in the household	
Number of vehicles in the household	

I authorise stevensdrake to use the following:	Yes	No
Personal account information by SMS		
Personal account information by email		
Employment Details		
Occupation		
Name of Employer		•
Next pay date (dd/mm/yyyy)	/	/

Income - Please provide details of all income you receive for each below on a monthly basis

Earnings	(monthly)

Salary or wages (take home pay)	£
Pensions (monthly)	
State Pension	£
Private or work pension	£
Pension Credit	£
Other pensions	£
Other Income (monthly)	
Additional adult contributions to bills	£
Maintenance/Child maintenance (CMS/CSA)	£
Boarders or lodgers	£
Student loans or grants	£
Other incomes (including self-employment)	£
Total income (A)	£

Universal Credits	£
Jobseekers Allowance (income based)	£
Jobseekers Allowance (contribution based)	£
Income Support	£
Working Tax Credits	£
Child Tax Credit	£
Child Benefit	£
Employment and Support Allowance or SSP	£

Pay Frequency

Benefits (monthly)

Carers Allowance Housing Benefit/Council Tax Support Disability Living Allowance, PIP Other benefits/tax credits (e.g. maternity) Total Benefits (B)

School Costs (monthly) - if appropriate

Fixed Expenditure - Please provide details of your monthly expenditure for each expense below

Home and Contents (monthly)	Regular Repayment	Arrears Amount	Arrears Repayment
Rent	£	£	£
Mortgage	£	£	£
Mortgage endowment	£		
Ground rent/Service charges (factor fee Scotland)	£	£	£
Secured loans	£	£	£
Council Tax (water for Scotland, called 'Rates' for NI)	£	£	£
Appliance/Furniture Rental (including HP)	£	£	£
TV License	£	£	£
Court fines		£	£
HMRC (i.e. tax, benefit overpayment)		£	£

Nent	L	_	L	School dillionii
Mortgage	£	£	£	After school clubs/School Trips
Mortgage endowment	£			Pensions and Insurances (monthly)
Ground rent/Service charges (factor fee Scotland)	£	£	£	Pension payments
Secured loans	£	£	£	Life Insurance
Council Tax (water for Scotland, called 'Rates' for NI)	£	£	£	Mortgage PPI
Appliance/Furniture Rental (including HP)	£	£	£	Buildings and contents insurance
TV License	£	£	£	Health insurance (medical/accident)
Court fines		£	£	Professional Costs
HMRC (i.e. tax, benefit overpayment)		£	£	Professional courses
Utilities (monthly)	='			Union fees

Water	£	£	£
Care and Health Costs (monthly)			
Child/Adult care (non-priority)	£		
Child maintenance or child support	£	£	£
Prescriptions and medicines	£		
Dentists and opticians	£		
Transport and Travel	£		
Public Transport / Taxis	£		
Hire Purchase/Conditional sale vehicle	£	£	£
Car insurance	£		
Road tax	£		
Fuel, parking and toll road charges	£		
MOT and maintenance	£		

Total Fixed Expenditure (monthly)

Breakdown cover

Other fuel (i.e. calor gas, coal, oil)

Electricity

Total Regular Repayments (C) Total Debt Arrears Repayments (D)

£	
£	

School uniform	£
After school clubs/School Trips	£
Pensions and Insurances (monthly)	
Pension payments	£
Life Insurance	£
Mortgage PPI	£
Buildings and contents insurance	£
Health insurance (medical/accident)	£
Professional Costs	
Professional courses	£
Union fees	£
Professional fees	£

Regular

Repayment

Communications and Leisure (monthly)	Regular Repayment
Home phone (landline), internet, TV package	£
Mobile	£
Hobbies, leisure, sport	£
Gifts	£
Pocket money	£
Newspaper, magazines, postage	£
Other	£
Food and Housekeeping (monthly)	
Groceries (food, milk, cleaning, pet food)	£
Nappies, baby items	£
School/Work meals	£
Laundry, dry cleaning	£
Alcohol, smoking products	£
Vet bills & pet insurance	£
House repairs and maintenance	£
Other	£
Personal Costs (monthly)	
Clothing and footwear	£
Hairdressing	£
Toiletries	£
Other	£

Non-Priority Debts (monthly)	Amount Owed	Regular Repayment
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
Total Non-Priority Debts (F)	£	£

Summary (monthly)

Total Flexible Expenditure (E)

(1) Total Income (A+B)	£
(2) Total Regular Repayments and Flexible Expenditure (C+E)	£
(3) Disposable Income before Savings and Debt Repayments (1 minus 2)	£
(4) Savings Contribution **We recommend 10% of the above figure or £20.00	£
(5) Total Priority Debt Repayments (D)	£
(6) Monthly Disposable Income available for non-priority creditors (3 minus 4 minus 5)	£

Offer of Repayment

I would like to offer regular repayments of

Starting on the specified date (mm/dd/yyyy)		/	/
Frequency (monthly, weekly, fortnightly, 4 weekly)			
Please select your preferred payment method below (tick b	юх) -		
Direct Debit ** May incur charges if funds are not available			
Continuous Payment Authority (CPA)			
Standing Order			
Card Payment			
Cheque/Postal Order			

Direct Debit (DD) Details - if appropriate

If your chosen payment method is DD please provide the following		
Account holder's name		
Name of bank		
Sort Code		
Account number		

Please note that we can only setup direct debit payments on 1st, 15th or 28th. We require at least 7 days notice to setup a direct debit payment

Declaration: I declare the above figures to be accurate to the best of my knowledge.

Signed		Dated	

Tips for completion

- 1. If you have difficulty completing this form you can call us during office opening hours on 01293 596907 (Monday to Friday 09:00 to 17:00) for assistance.
- 2. An accurate financial statement ensures your repayments to creditors are affordable and sustainable. Some customers find it useful to have a bank statement to hand when completing this form to ensure actual figures are entered on the form.
- 3. Converting weekly, fortnightly and four weekly payments to monthly:

Weekly amount x 52/12 = monthly amount i.e. £20 per week: £20 x 52 = £1,040 / 12 = £86.67 per month. Fortnightly amount x 26/12 = monthly amount i.e. £20 per fortnight: £20 x 26 = £520 / 12 = £43.33 per month. 4 weekly amount x 13/12 = monthly amount i.e. £20 every four weeks: £20 x 13 = £260 / 12 = £21.67 per month

- 4. If you are behind with any of your 'Regular Repayments' within the 'Fixed Expenditure' section these are considered priority debts (mortgage/rent, Council Tax, etc.) which is why we ask for them to be recorded separately. Please enter your regular repayment amount and, in addition, the amount you pay towards any arrears in the Arrears Repayment' section.
- 5. Some of our customers who are in financial difficulty or have priority debts without a repayment plan in place find it useful to take guidance from a free debt advice by contacting either Step Change 0800 138 1111 or National Debtline 0808 808 4000. If you would like time to take advice, please contact us to let us know so that we can place your account on hold to stop any unnecessary escalation in collection activity.