

Prism Financial Advice Limited – Income & Expenditure Calculator

Client Details

Client (1) Name: (A)		Company Name: (C)	Prism Financial Advice Limited
Client (2) Name: (B)		Adviser Name:	

Client Address:			
		Postcode:	

Monthly Income

Name(s)	Description	Monthly (Net) Income		
Client 1	<i>Example: Monthly Salary, Pension, Benefits etc.</i>	£		
Client 2	<i>Example: Monthly Salary, Pension, Benefits etc.</i>	£		
Other Income		Client 1	Client 2	Joint
Other Income Source <i>(Please state)</i>		£	£	£
Total Monthly Income ►		£		

Monthly Expenditure *(Please detail individual and joint expenditure where indicated)*

Expenditure Type	Description	Client 1	Client 2	Joint
Mortgage Payment		£	£	£
Loans	<i>Example: Personal Loans, Credit Card Payments etc.</i>	£	£	£
Monthly Savings	<i>Example: Savings Plans, Banks/Building Society Accounts etc.</i>	£	£	£
Insurance Premiums	<i>Example: Home Contents, Buildings, Life Insurance etc.</i>	£	£	£
Car Costs	<i>Example: Tax, Insurance, Running etc.</i>	£	£	£
Council Tax		£	£	£
Utilities	<i>Example: Water, Electricity, Gas, Telephone etc.</i>	£	£	£
Household Expenses	<i>Example: Food, Sundries, Television Subscriptions etc.</i>	£	£	£
Entertainment	<i>Example: Dining Out, Social Expenses etc.</i>	£	£	£
Miscellaneous – <i>Please State</i>		£	£	£
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Miscellaneous – <i>Please State</i>		£	£	£
Miscellaneous – <i>Please State</i>		£	£	£
Miscellaneous – <i>Please State</i>		£	£	£
Miscellaneous – <i>Please State</i>		£	£	£
Total Monthly Expenditure ►		£	£	£

Signatures

Client (1) Signature: (A)		Company Signatory: (Adviser) (C)	
Client (2) Signature: (B)		Date: ►►►►	