INCOME EXPENDITURE PLANNER Second customer Total First customer Main employment Ε E Secondary employment E E Investment & other income E E (please state source) **TOTAL NET MONTHLY** E Ε E Anticipated mortgage E Ε Endowment/Life Assurance E Ε Buildings/contents E E Accident, Sickness & E E Unemployment insurance E E Shared ownership rent Ground rent/service charge E E E E **TOTAL MONTHLY HOUSING** E Ε E Council tax/water rates E E Electricity/Gas etc E E E E TV licence/Sky/Cable E E **TOTAL MONTHLY UTILITY** E E Ε E E E E Clothing/Hairdressing Healthcare/Dentist E E E E **TOTAL MONTHLY GENERAL** E E Ε E E Ε E Car loan/Personal loan/HP E Credit cards/other E **TOTAL FIXED MONTHLY** E Ε E Public transport/Petrol E E E Tax/Insurance/repairs etc E **TOTAL MONTHLY TRAVEL** E E Ε Other (inc: Holidays, Ε E entertainment, pet bills etc) **TOTAL MONTHLY SUNDRY** E E E **TOTAL MONTHLY INCOME** E E **EXCESS OR DEFICIT OF** E **INCOME OVER EXPENDITURE**

Income

(take home pay)

(take home pay)

INCOME Expenditure

payment

premium

insurance

Repairs

COSTS

Telephone

subscription

Pension costs

Maintenance

COMMITMENTS

COSTS

COSTS

EXPENSES

TOTAL MONTHLY

EXPENDITURE

COSTS

Food