

Income Expenditure Planner

Income

- Main employment
(take home pay)
- Secondary employment
(take home pay)
- Investment & other income
(please state source)

TOTAL NET MONTHLY INCOME

Expenditure

- Anticipated mortgage payment
- Endowment/life assurance
premium
- Building/contents insurance
- Accident, sickness &
unemployment insurance
- Shared ownership rent
- Ground rent/service charge
- Repairs

TOTAL MONTHLY HOUSING COSTS

- Council tax/water rates
- Electricity/Gas etc
- Telephone
- TV licence/Sky/cable
subscription

TOTAL MONTHLY UTILITY COSTS

- Food
- Clothing/hairdressing
- Healthcare/Dentist
- Pension costs

TOTAL MONTHLY GENERAL COSTS

- Maintenance
- Car loan/personal loan/HP
- Credit cards/other

TOTAL FIXED MONTHLY COMMITMENTS

- Public transport/petrol
- Tax/insurance/repairs etc

TOTAL MONTHLY TRAVEL COSTS

- Other (inc: holidays,
entertainment, pet bills etc)

TOTAL MONTHLY SUNDRY EXPENSES

TOTAL MONTHLY INCOME

TOTAL MONTHLY EXPENDITURE

EXCESS OR DEFICIT OR INCOME OVER EXPENDITURE

First customer

Second customer

Total

£	£	
£	£	
£	£	
£	£	£
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