

Monthly Mortgage Budget Planner

For use by FCA authorised intermediaries only.

Please download and save this form **before** you fill it in – if you add any details online first, they will be deleted when you download or save the form.

YOUR PERSONAL DETAILS

	Full Name (including any middle name(s) as appears on ID)	Household	
Applicant 1	<input type="text"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Applicant 2	<input type="text"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Applicant 3	<input type="text"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Applicant 4	<input type="text"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>

A household is defined as each individual's residence. If all customers live together this would be classed as one household. If the customers live in two separate properties this would be classed as two households. An example would be where a customer's parents are coming on to the mortgage as joint borrowers, the son/daughter would be household one and, the parents would be in household two. We only accept a maximum of two households.

BUDGET PLANNER

Please complete this budget planner with your anticipated monthly expenditure once you mortgage completes.

Expenditure Type	Household 1 (property to be mortgaged)	Household 2
Food and non-alcoholic drinks	£ <input type="text"/>	£ <input type="text"/>
Alcoholic drinks, tobacco	£ <input type="text"/>	£ <input type="text"/>
Clothing and footwear	£ <input type="text"/>	£ <input type="text"/>
Housekeeping (gas and electricity)	£ <input type="text"/>	£ <input type="text"/>
Household goods and services	£ <input type="text"/>	£ <input type="text"/>
Health	£ <input type="text"/>	£ <input type="text"/>
Transport	£ <input type="text"/>	£ <input type="text"/>
Communication (mobile phones, broadband, etc.)	£ <input type="text"/>	£ <input type="text"/>
Recreation and culture	£ <input type="text"/>	£ <input type="text"/>
Restaurants and Hotels	£ <input type="text"/>	£ <input type="text"/>
Miscellaneous goods and services	£ <input type="text"/>	£ <input type="text"/>
Household insurances	£ <input type="text"/>	£ <input type="text"/>
Council tax	£ <input type="text"/>	£ <input type="text"/>
Total	£ <input type="text"/>	£ <input type="text"/>