

Statement of Personal Details, Assets, Liabilities, Income & Expenditure



www.swansea-bs.co.uk

Your Details

First Applicant

Title (Mr/Mrs/Etc.)	
First Name(s)	
Surname	
Date of Birth	DD / MM / YYYY
Current Address	
	Postcode
Occupation(s)	
Employer's Address	
	Postcode
Contact Details	
Business Phone (+Code)	
Home Phone (+Code)	
Work Phone (+Code)	
Mobile Phone	
email Address	

Second Applicant

Title (Mr/Mrs/Etc.)	
First Name(s)	
Surname	
Date of Birth	DD / MM / YYYY
Current Address	
	Postcode
Occupation(s)	
Employer's Address	
	Postcode
Contact Details	
Business Phone (+Code)	
Home Phone (+Code)	
Work Phone (+Code)	
Mobile Phone	
email Address	

Family, dependants and other people who live with you

Name	Date of Birth	Relationship
	DD / MM / YYYY	
	DD / MM / YYYY	
	DD / MM / YYYY	
	DD / MM / YYYY	
	DD / MM / YYYY	

Properties Owned

Assets		Liabilities	
Properties	Value	Property Mortgages/Loans	Amount Outstanding
Residential Home Address (including Postcode)	£	Provider	£
Investment/Other Property Address (including Postcode)	£	Provider	£
Investment/Other Property Address (including Postcode)	£	Provider	£
Total	£	Total	£

Non Property Liabilities

Credit Cards/Personal Loans	
Provider	Amount Outstanding
1	£
2	£
3	£
Total	£

HP/Car Finance	
Provider	Value
1	£
2	£
3	£
Total	£

Other Liabilities	
Provider	Value
1	£
2	£
3	£
Total	£

Non Property Assets

Investments/Shares/ISAs	
Provider	Value
1	£
2	£
3	£
Total	£

Pensions	
Provider	Value
1	£
2	£
3	£
Total	£

Other Assets	
Provider	Value
1	£
2	£
3	£
Total	£

A - Annual Income Summary

Joint Annual Income	Gross	Net
Salaries/Drawings (Please detail any guaranteed bonuses separately)	£	£
Self	£	£
Spouse Partner	£	£
Other Annual Income (Please detail any guaranteed bonuses separately)	£	£
Self	£	£
Spouse Partner	£	£
Benefits Income	£	£
Total Annual Income (A)	£	

B - Total Household Monthly Expenditure

Mortgage/Rent	£
Tax/NI/VAT	£
Council Tax/Water Rates	£
Travel/Car Expenditure	£
Gas/Electricity	£
Maintenance of Ex Partner	£
Loan/Hire Purchase Repayments	£
Catalogues	£
Insurance Premiums	£
TV/Telephone/Broadband/Mobile	£
Pension	£
Clothing/JHobbies/Leisure	£
Savings	£
Schools/University Fees (please provide expiry date)	£
Food/Housekeeping	£
Others (please specify)	£
Total Monthly Expenditure (B)	£
Total Monthly Disposable Income (A) less (B)	£

Declarations TO BE READ, COMPLETED AND SIGNED BY ALL APPLICANTS

I/We confirm that:

- 1 I am a customer of Swansea Building Society. I make this Statement on my own behalf, and confirm that its contents are true to the best of my knowledge, information and belief.
- 2 This Statement is given in relation to my on-going indebtedness/liabilities to Swansea Building Society, and to my current financial circumstances.

Applicant 1 Name (print)			
Applicant 1 Signature	Date	DD / MM / YYYY	

Applicant 2 Name (print)			
Applicant 2 Signature	Date	DD / MM / YYYY	