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



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Your Details

First Applicant

Title (Mr/Mrs/Etc.)			
First Name(s)			
Surname			
Date of Birth	DD/M	M / Y	YYY
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/M	M / Y	YYY
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	

Properties Owned

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

Non Property Liabilities

	Credit Cards/Personal Loans		
Provider Amount Outstanding		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.

