

Budget Planner

Name: _____

Account Number: _____

A. Monthly Income	
Wages (include any regular overtime / bonuses)	
Partner's wages (include any regular overtime / bonuses)	
Child Benefit / Universal Credit	
Tax Credits	
Income Support or Tax Credit	
Jobseekers Allowance	
Maintenance	
Retirement or works pension	
Contributions from others in the household	
Other 1: _____	
Other 2: _____	
A. Total Income	

B. Everyday Monthly Expenses and Priority Bills	
Mortgage / Rent	
Shared Ownership Rent	
Ground rent or service charge	
Second mortgage or other secured loan	
Endowment Policy / Life insurance	
Council Tax	
Electricity	
Gas or other fuel	
Water charges	
Phone / mobile phone charges	
Household insurance	
TV rental and licence	
Car tax and insurance	
Travelling expenses e.g petrol / public transport	
Housekeeping (food and Toiletries)	
Prescriptions and health costs	
Clothing	
School meals / meals at work	
Childminding / childcare	
Maintenance payments	
Court fines	
Pension contributions	
Hire purchase (car, motorcycle etc)	
Other 1: _____	
Other 2: _____	
Other 3: _____	
B. Total Spending	

C. Priority Debt Arrears		
	Total Outstanding	Monthly Repayment
Mortgage		
Shared Ownership rent arrears		
Second mortgage or secured loan arrears		
Council tax arrears		
Electricity arrears		
Gas arrears		
Court fine arrears		
Maintenance arrears		
Hire purchase arrears		
Other 1: _____		
Other 2: _____		
C. Total amount being repaid each month		

D. Unsecured Debts		
Creditor	Balance Owed	Monthly Repayment
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
D. Total monthly repayments		

Number of people in my household	
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 **This is an accurate record of my financial position**

Signed:	
Date:	