

Expenses Questionnaire
Confidential Financial Review



IMPORTANT: PLEASE ENTER YOUR DATA DIRECTLY INTO THIS PDF (USING ADOBE READER)

Current Expenditure

Name:

Date Completed:

Financial Planning Questionnaire

Confidential Financial Review

Annual Expenditure Analysis Per Year

| Item | Amount | |
|-------------------------|---------|--------|
| | Monthly | Annual |
| Basic - Home | | |
| Mortgage/rent | | |
| Council tax | | |
| Water | | |
| Electricity | | |
| Gas | | |
| TV - Satellite | | |
| Alarm Security | | |
| Home telephone internet | | |
| Mobiles | | |
| Home insurance/contents | | |
| Food and housekeeping | | |
| Cleaning | | |
| Property maintenance | | |
| Garden maintenance | | |
| | | |
| | | |
| Sub-total | | |

| Item | Amount | |
|-----------------------------|---------|--------|
| | Monthly | Annual |
| Basic - Vehicles | | |
| Car depreciation or payment | | |
| Petrol/diesel | | |
| Servicing and maintenance | | |
| Car Insurance | | |
| Car Other | | |
| | | |
| | | |
| | | |
| Sub-total | | |

| Item | Amount | |
|---------------------------|---------|--------|
| | Monthly | Annual |
| Basic - Personal | | |
| Clothing | | |
| Wines/spirits alcohol | | |
| Magazines - Subscriptions | | |
| Beauty/grooming | | |
| Public transport/taxis | | |
| Childcare | | |
| Cigarettes | | |
| Charitable donations | | |
| Gifts | | |
| Pets | | |
| | | |
| | | |
| Sub-total | | |

| Item | Amount | |
|---------------------------|---------|--------|
| | Monthly | Annual |
| Basic - Medical | | |
| Private medical insurance | | |
| Dentist | | |
| Optician | | |
| | | |
| | | |
| Sub-total | | |

| Item | Amount | |
|------------------|---------|--------|
| | Monthly | Annual |
| Luxury | | |
| School Fees | | |
| | | |
| | | |
| | | |
| Sub-total | | |

Calculator

Enter monthly amount

Total per year

| Item | Amount | |
|---------------------|---------|--------|
| | Monthly | Annual |
| Leisure | | |
| Sports/hobbies | | |
| Holidays and travel | | |
| Entertainment | | |
| Eating out | | |
| Cash withdrawals | | |
| | | |
| Sub-total | | |

Milestones - e.g World Cruise 2022 £30,000.

| | |
|------------------|--|
| | |
| | |
| | |
| | |
| | |
| Sub-total | |

Totals

Basic

Leisure

Luxury

Grand Total