

SFS data entry



Name: _____

D.O.B.: _____

Application: Single Joint

Partner (if applicable): _____

Partner D.O.B. (if applicable): _____

Address: _____

Dependent children: Under 16: _____ 16-18: _____

Other dependants: _____

Number in household: _____

Number of vehicles in household: _____

Housing tenure: Owner Mortgage Tenant – private
 Tenant – social Living with parents Other

Please confirm you have considered (or discussed with an adviser) the use of any assets to make lump sum payments Tick to confirm

Contact/team name: _____

Agency: _____

Agency address: _____

Membership code number: _____

Case reference number: _____

Date of statement: _____

Date of review (if applicable): _____

Employment: Full-time Part-time
 Unemployed Not working due to illness / disability
 Self-employed Retired Carer Student Other

Partner's employment: Full-time Part-time
 Unemployed Not working due to illness / disability
 Self-employed Retired Carer Student Other

Overview

	Amount (£)	Notes
Total income		
Total outgoings		
(Savings contribution)		
Debt admin fee (if applicable):		
Total available for priority creditors		
Total available for non-priority creditors		

Monthly Income

Earnings	Amount (£)	Notes
Salary or wages (take home)		
Partner salary or wages (take home)		
Other earnings (including self employment)		
Total salary and wages per month		

Benefits and tax credits	Amount (£)	Notes
Universal Credit		
Jobseeker's Allowance (income based)		
Jobseeker's Allowance (contribution based)		
Income Support		
Working Tax Credit		
Child Tax Credit		
Child Benefit		
Employment and Support Allowance or Statutory Sick Pay		
Disability benefits		
Carer's Allowance		
Local Housing Allowance / Housing Benefit		
Council Tax support		
Other benefits/tax credits (e.g. maternity benefits)		
Total benefits and tax credits per month		

(continued overleaf)

Monthly Income *(continued)*

Pensions	Amount (£)	Notes
State pensions		
Private or work pensions		
Pension credit		
Other pensions		
Total pensions per month		

Other income	Amount (£)	Notes
Maintenance or child support		
Boarders or lodgers		
Non-dependants' contributions		
Student loans and grants		
Other income		
Total other income per month		

Monthly Outgoings: Fixed Costs

Home and contents	Amount (£)	Notes
Rent		
Ground rent & service charges (factor fees if you live in Scotland)		
Mortgage		
Mortgage endowment		
Secured loans		
Council tax/rates (including water charge if you live in Scotland and rates in NI)		
Appliance & furniture rental (including appliance and furniture HP, conditional sale and so on)		
TV licence		
Other costs		
Total home & contents costs per month		

Utilities	Amount (£)	Notes
Gas		
Electricity		
Other costs (including coal, oil, calor gas and so on)		
Other expenditure		
Total utilities costs per month		

Water	Amount (£)	Notes
Water supply		
Water waste		
Total water costs per month		

(continued overleaf)

Monthly Outgoings: Fixed Costs *(continued)*

Care and health costs	Amount (£)	Notes
Childcare costs		
Adult-care costs		
Child maintenance or child support		
Prescriptions and medicines		
Dentistry and opticians		
Other costs		
Total care and health costs per month		

Transport and travel	Amount (£)	Notes
Public transport (e.g. work, school, shopping)		
Hire Purchase or conditional sale vehicle		
Car insurance		
Road tax		
MOT and ongoing maintenance		
Breakdown cover		
Fuel, parking and toll road charges		
Other costs (including taxis)		
Total transport and travel costs per month		

School costs	Amount (£)	Notes
School uniform		
After-school clubs and school trips		
Other costs		
Total school costs per month		

Pensions and insurances	Amount (£)	Notes
Pension payments		
Life insurance		
Mortgage payment protection insurance		
Buildings and contents insurance		
Health insurance (medical or accident or dental)		
Other		
Total pensions and insurance costs per month		

Professional costs	Amount (£)	Notes
Professional courses		
Union fees		
Professional fees		
Other		
Total professional costs per month		

Other essential costs	Amount (£)	Notes
<i>Other essential costs</i>		
Total other essential costs per month		

Monthly Outgoings: Flexible Costs

Communications and leisure	Amount (£)	Notes
Home phone, internet, TV package (including film subscriptions)		
Mobile phone		
Hobbies, leisure or sport (e.g. socialising, eating out, outings, clubs, leisure courses)		
Gifts (e.g. birthdays, festivals, charity donations)		
Pocket money		
Newspapers, magazines, stationery and postage		
Other costs		
Total communications and leisure costs per month		

Food and housekeeping	Amount (£)	Notes
Groceries (e.g. food, pet food, non-alcoholic drinks, cleaning)		
Nappies and baby items		
School meals and meals at work		
Laundry and dry cleaning		
Alcohol		
Smoking products		
Vet bills & pet insurance		
House repairs and maintenance		
Other costs		
Total food and housekeeping costs per month		

Personal costs	Amount (£)	Notes
Clothing and footwear		
Hairdressing		
Toiletries		
Other costs		
Total personal costs per month		

Total Monthly Outgoings: (fixed and flexible)

	Amount (£)
Total costs per month	

Savings

	Amount (£)
Please confirm that a monthly contribution to savings has been considered (or discussed with an adviser)	Tick to confirm <input type="checkbox"/>

Debt Admin Fee (if applicable)

	Amount (£)	Notes
Total fee per month		

Additional notes (e.g. reasons for debt, circumstances, temporary situations)

e.g. Made redundant in June 2014 and was out of work for 6 months

*e.g. **Communications and leisure:** mobile phone – client has multiple family members abroad*

This financial statement is an accurate record of the information provided.

Signed:

Date: