

Reference:

Name:

Address:

New address:  
(if different to  
above)

Equivo Ltd



Membership code number: 12884355

### Household

Dependent children: Under 16: 16-18:

Other dependents:

Number of adults in household:

Number of vehicles in household:

Occupation:

### Employment

Please select:

- |  |                                     |                                  |
|--|-------------------------------------|----------------------------------|
| <input type="checkbox"/> Full-time                               | <input type="checkbox"/> Part-time  | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Self-employed                           | <input type="checkbox"/> Unemployed | <input type="checkbox"/> Carer   |
| <input type="checkbox"/> Not working due to illness / disability | <input type="checkbox"/> Other      |                                  |

Employer:

Address:

### Monthly income

Amount (£)

Salary or wages

Partner's salary or wages

Benefits

Pension

Other income

**Total monthly income**

### Assets

Value (£)

Property (current value less mortgage(s))

Savings or investments

Shares

Vehicles

Other assets

**Total assets**

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

### Monthly fixed costs

#### Home and contents

Amount (£)

Mortgage

Rent

Ground rent & service charges

Secured loans

Mortgage endowment

Council tax/rates

**Total home and contents**

#### Utilities and services

Amount (£)

Gas

Electricity

Other (coal, oil, calor gas etc.)

Water

TV license

Appliance or furniture rental

**Total utilities and services**

#### Travel

Amount (£)

Fuel, parking and toll charges

Car insurance

Hire purchase or conditional sale

Road tax

MOT and servicing

Breakdown cover

Public transport

**Total travel**

#### Care and health

Amount (£)

Childcare costs

Child support or maintenance

Adult care costs

Dentist and Optician costs

Medical insurance

Prescriptions and medicines

Other care and health costs

**Total care and health**

#### Pensions and insurances

Amount (£)

Pension (SIPP contributions)

Life insurance

Mortgage payment protection

Buildings and contents insurance

Other insurances

**Total pensions and insurances**

#### Other costs

Amount (£)

School uniform

After-school clubs

School trips

Union fees

Professional fees

**Total other costs**

**Total monthly fixed costs**

