

ESTIMATED STATEMENT OF ASSETS AND LIABILITIES

Name:

Address :

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1. ASSETS

a. Heritable/property/house

(i) Do you own your house wholly/solely or jointly?

wholly owned	
jointly owned	

(ii) If jointly owned, please give details of joint owner.

(iii) Name all individuals who live in the property

Name	Relationship to you

(iv) Estimated current selling value of property : £

(v) Name and details of secured lenders (i.e. mortgage providers)

Name	Reference	Amount advanced	Amount outstanding
		£	£

b. Other Assets

(vi) Are any insurance policies assigned to the secured lender in respect of the borrowings? Yes/No

(vii) If yes, please provide details

Insurance company	Policy number	Value of property
		£

(viii) Details of any other life policies

Insurance company	Policy number	Type of policy	Sum assured	Date of maturity
				£

(ix) Investments - pensions, stocks, shares, savings bonds, premium bonds etc

Type of investment	Name of company	Reference number

(x) Motor vehicles

Do you own a motor vehicle? Yes/No

(xi) Are you the registered keeper of the vehicle? Yes/No

(xii) If yes to either of above, list for each vehicle

Registration number :

Make and model :

Is the vehicle insured? Yes/No

Where is the vehicle? :

Estimated value of vehicle : £ _____

Is vehicle subject to finance? Yes/No

If yes, please advise:

Name of finance company :

Agreement number :

Date agreement commenced :

Date agreement finalised :

Monthly repayment : £ _____

(xiii) Bank, building society and other accounts:

Name and address of deposit taker	Type of account	Account number	Current balance
			£

(xiv) **Other Assets** i.e. antiques, jewellery, electrical goods, potential inheritances, known benefits due under a will, claims for damages, court cases instigated by you.

Please provide details

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2. LIABILITIES

(i) Unsecured loans

Name of lender	Reason for loan	Initial amount advanced	Balance outstanding
			£

(ii) Hire purchase/finance agreements

Name of lender	Reason for loan	Initial amount advanced	Balance outstanding
			£

(iii) Credit and store cards (Mastercard, Visa, M & S, Next etc)

Card	Card reference number	Amount due
		£

(iv) Household accounts outstanding, if applicable

Utility	Provider	Amount outstanding
Rent		
Council tax		
Telephone		
Mobile phone		
Gas		
Electricity		
Coal		

(v) Provide details of any other monies which you owe: