



BRITISH BANKERS' ASSOCIATION

**Money
Advice
Trust**

Budget Form (v3)

**for use with
MAT/BBA
Common Financial
Statement**

Client(s) Name(s)					
Case Reference					
Date					
Employment Status ie., unemployed/full/part-time					
Number in Household					
Age of Children					
Income	Weekly	Monthly	Quarterly	Annually	Adviser's Use
Wages/Salary					
1 Client's earnings (net)					
2 Partner's earnings (net)					
3 Other earnings (net)					
4 Total Wages/Salary					
Other Income					
5 Maintenance/Child Support					
6 Boarders/Lodgers etc.					
7 Student Loan					
8 Student Grant					
9 Other					
10 Total Other Income					
Pensions					
11 Client					
12 Partner					
13 Other (War, Annuity, Retirement, etc.)					
18 Total Pensions					
Benefits					
19 Attendance Allowance					
20 Child/One Parent Benefit					
21 Council Tax Benefit					
22 Disability Living Allowance					
23 Child Tax Credit					
24 Working Tax Credit					
25 Housing Benefit					
26 Incapacity Benefit					
27 Income Support					
28 Industrial Disablement Benefit					
29 Carers' Allowance					
30 Maternity Allowance					
30a Jobseeker's Allowance					
30b Statutory Maternity Pay					
30c Statutory Sick Pay					
30d Bereavement Benefit					
30e Other (Please specify)					
31 Total Benefits					
32 TOTAL INCOME (4+10+18+31)					

ASSETS					
House/Flat					
33 Estimated current value					
34 Mortgages outstanding					
35 Equity (33-34)					
PLEASE CONFIRM THAT YOU HAVE DISCUSSED THE USE OF ANY ASSETS TO MAKE LUMP SUM PAYMENTS					YES/NO
Car/Motorbike					
36 Estimated current value					
37 HP/Conditional Sale outstanding					
38 Net Value (36-37)					
Savings or saving schemes					
39 TESSA					
40 Higher Rate Deposit					
41 Building Societies					
42 Other					
Total Savings or saving schemes					
Please list BELOW any other assets or opportunities for lump sum payments which you may wish to use repaying debts, for example bonuses etc.					
Item	Value				
Total Assets					

EXPENDITURE	Weekly	Monthly	Quarterly	Annually	Adviser's Use
Housing Costs					
43 Rent					
44 Mortgage					
45 Other Secured Loans (e.g. 2nd Mtge)					
46 Council Tax					
46a Other					
Other Housing Costs					
47 Mortgage Protection Premium					
48 Ground Rent and Service Charges					
49 Contents Insurance					
50 Building Insurance					
51 Mortgage Endowment					
52 Other Life Assurance					
53 Other					
54					
55 Total Other Housing Costs (47 to 54)					

Utilities					
56 Gas					
57 Electricity					
58 Water					
59 Coal					
60 Oil/Paraffin					
61 Calor Gas					
62 Other					
63 Total Utilities (56 to 62)					
Other Important Items					
64 Court Fines/Orders					
65 Maintenance/Child Support					
66 Pension/AVC payments					
67 Other Life Assurance					
68 HP/Conditional Sale					
69 TV Licence					
70 Telephone					
71 Mobile Phone					
71a Other					
72 Total Other important items (64 to 71a)					
Travel					
73 Work					
74 School					
75 Shopping					
76 Other fares					
77 Road tax					
78 Insurance					
79 Fuel/Oil					
80 MOT/Maintenance					
81 Breakdown/Recovery					
82 Parking Charges/Tolls					
83 Other					
84					
85 Total Travel (73 to 84)					
Housekeeping					
86 Food/milk					
87 Cleaning/Toiletries					
88 Newspapers/Magazines					
89 Cigarettes/Tobacco/Sweets					
90 Alcohol					
91 Laundry/Dry Cleaning					
92 Clothing/Footwear					
93 Other					
94					
95 Total Housekeeping (86 to 94)					

Children					
96 Childcare					
97 Nappies/Baby items					
98 School fees					
99 School Meals/trips					
100 Pocket Money					
100a Other					
101 Total Children (96 to 100a)					
Health					
102 Dentist/Prescriptions/Glasses					
103 Care costs (other than childcare)					
104 Health insurance					
104a Other					
105 Total Health (102 to 104a)					
Pets					
106 Pet Food					
107 Vets' bills/Pet insurance					
107a Other					
108 Total Pets (106 to 107a)					
Repairs and Maintenance					
109 Repairs					
110 Household Maintenance					
111 Window Cleaning					
112 Maintenance Contracts					
112a Other					
113 Total Repairs and Maintenance (109 to 112a)					
Other Expenditure					
114 Membership/Professional subs					
115 Postage					
116 Hairdressing/Haircuts					
117 TV/Video/Sat/Cable					
118 Other Appliance rentals					
119 Pub/Outings					
120 Lottery					
121 Hobbies (eg gardening etc)					
122 Religious & charitable giving					
123 Gifts (eg Christmas, Birthdays)					
123a Student Course Costs/Fees					
123b Student Tuition Fees					
123c Other					
124 Total Other Expenditure (114 to 123c)					
TOTAL EXPENDITURE (43+44+45+46+55+63+72+85+95+101+105+108+ 113+124)					

