

Mortgage Budget Planner

Applicant 1 name

Applicant 2 name

Please complete all areas on the budget planner

Household
Composition

Number of adults & children in the household

Annual Income

Gross basic employed income

Allowances e.g car allowance/large town allowance

Overtime commission or bonus

Self employed salary & dividends

Self employed net profit (for the last 2 years)

Gross pension income

APPLICANT 1

APPLICANT 2

Monthly Income

Net take home employed income from payslip

Net monthly state pension income

Net monthly private pension income

Child benefit/tax credits/CSA

State benefits

Investment income

Maintenance payments

Rental income

Monthly
Commitments

Total loan payments

Other mortgage(s)

Total credit card balances

Monthly
Expenditure

Nursery/school/university fees

Council tax

Life/health/buildings/contents insurance & private pensions

Food/drink

Travel/transport

Housing/fuel/power & communication

Clothing/footwear/recreation & essential repairs

TOTAL

DATA PROTECTION

Information which you provide to Ipswich Building Society or which is obtained by us through our dealings with you may be held on our computers and in other ways and used by us to administer your application, for statistical analysis, for debt collection and fraud prevention.