

Income and Expenditure Form

Confidential Questionnaire

Financial Support
50 St. Edward Street, Leek,
Staffordshire, ST13 5DL

Email: financialsupport@leekbs.co.uk
Tel: 0808 168 8570

To enable the Society to help you with your finances it's important that we get a full understanding of your financial position so that we can make sure the support we provide is the most suitable for your circumstances.

Before you complete the form, please read the notes below as these will provide guidance on how to complete the form and avoid the need for additional questions.

Guidance Notes:

- Where the mortgage is joint, please ensure you provide details for both parties to the mortgage for all relevant sections
- If the mortgage is in your sole name, but you have a partner who either contributes to the household income or incurs expenditure that impacts on the household income, please include all details for your partner as well
- To help you complete the form, please have the following details to hand - payslips/self-employed accounts, bank statements, benefits statements, other loan/credit card statements or any other information that will assist in completion of the form
- Where your income isn't the same each month, record the lowest amount and where your expenses vary each month, put the highest amount
- Include all income and expenditure as monthly amount. Where this is an annual cost, divide by 12, and where this is a weekly cost, multiply by 52 and divide by 12.

If you need support, please contact us on 0808 168 8570 and we'll be happy to work on completing the document with you, or answer any questions you have.

You may either return the form back to us by post or email using the contact details at the top of this page. Please mark for the attention of the Financial Support Team.

Mortgage Account Number:

--

Section 1: Personal Details

	Account Holder 1	Account Holder 2
Full Name:		
Age:		
Address:		
Tel No Home:		
Tel No Mobile:		
Email Address:		

Note. Account Holder 2 can be partner where they contribute to either the income or expenditure within the household

	Account Holder 1	Account Holder 2
Number of people in your household:		
Please state the number of children/adults and their ages who are financially dependent on you:		
Are you financially responsible/guarantor for any person?	Y / N	Y / N
Do you currently own any other houses, properties or premises and are these subject to a mortgage?	Y / N	Y / N
If YES, please provide details here		
Please describe your occupation(s) fully, including average hours worked per week:		
Full name and address of Employer or your trading address:		
How long have you been with your present Employer?	years months	years months
Have you ever been bankrupt, or had a Court Order against you in respect of a debt?	Y / N	Y / N

	Debt (£):	Debt satisfied?
		Y / N
		Y / N
If YES to bankruptcy, please confirm the date it was filed:	dd/mm/yyyy	dd/mm/yyyy

Section 2: Monthly Income

	Monthly (£)
Basic Income (take home pay, incl self employed):	
Partner's Income (take home pay):	
Partner contributions:	
Pension Income:	
Benefits and tax credits:	
Maintenance or child support income:	
Other Income (state source):	
Total Income of combined Account Holder 1 and 2:	
Anticipated financial changes: Please advise of any changes to any of the above income that you're aware of over the next 12 months, i.e. benefits stopping/pay increases.	

Section 3: Assets or Equity

	Value (£)
Value of any other properties owned:	
Loans outstanding against other properties:	
Total equity:	
Value of any vehicles owned (less any HP outstanding):	
Savings:	
Other assets:	

Section 4: Expenditure - Monthly Total

Home and Utilities:

Monthly (£)

Mortgage (Leek Building Society):

Leek Mortgage Payment

Rent paid on other properties

Help to Buy loan

Council tax

Electric

Gas/alternative fuel

Water

Ground rent/service and/or estate charges

Policy payments (endowment)

Secured loans

1

(Monthly payment and Balance)

2

3

Unsecured loans/car loans

1

(Monthly payment and Balance)

2

3

Credit cards/store cards/catalogue

1

(Monthly payment and Balance)

2

3

Household appliance/sofa monthly

Food and Housekeeping

Groceries

Alcohol

Cigarettes/vapes

Newspaper/magazines

Eating out/takeaways

Section 4: Expenditure - Monthly Total

Health Care costs

Monthly (£)

Optician/contact lense subscription

--

Dentistry

--

Medical insurance

--

Prescription costs

--

Pension payments (self employed)

--

Child care/school costs

Child maintenance/CSA

--

Children activities

--

Pocket money

--

School fees

--

School dinners

--

School uniform

--

After school club/trips

--

Nursery/child care costs

--

Any other regular expenditure

i.e Legal costs/fees

--

--

Total Income (£)	
Total Expenditure (£)	
Disposable Income (£)	

Please use this space to make any notes regarding your commitments:

Section 5: Understanding your circumstances

(Please provide as much detail as possible)

What are your present difficulties or why are you requesting a change to your account?

Why have these arisen or what has changed?

How long do you expect to be in this position?

Please provide any other information that you think is relevant:

Data Protection Legislation

The Data Controller is Leek United Building Society trading as Leek Building Society, whose principal office is 50 St. Edward Street, Leek, Staffordshire, ST13 5DL.

The information you're supplying will be held by the Society and used for market research purposes, developing goods and services, statistical and business analysis, customer servicing, and administration. Your information may be passed to other companies within the Leek United group for the purposes stated above.

This information may be held during the life of the account and for administration reasons after the account has closed.

Under data protection legislation you're entitled to receive a copy of personal information held about you, have inaccurate data corrected, restrict the purposes for which your personal data is used and in certain circumstances the right to your data being erased. Further information regarding how we manage your data can be found within our Privacy Notice which can be found at leekbs.co.uk/privacy/, or alternatively can be requested from any of our branches or by writing to the address above.

If you'd like to obtain information held about you, please write to the address above.

Declaration

I/We acknowledge that where a concession or arrangement is agreed my/our details will be forwarded to the credit reference agencies and any information provided will be added to my customer record. This won't be shared with any third parties.

Signature:
(Account Holder 1)

Signature:
(Account Holder 2)

Date:

THE MORTGAGED PROPERTY (WHICH COULD BE YOUR HOME) MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE

Leek Building Society is a trading name of Leek United Building Society, which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority with firm reference number 100014. Our details can be found on the Financial Services Register at <https://register.fca.org.uk/s/>. Leek United Building Society's address for service is 50 St. Edward Street, Leek, Staffordshire ST13 5DL.