

EXPENDITURE QUESTIONNAIRE

NAME:	ANNUAL EXPENDITURE				Please refer to Important Notes on adjoining sheet		
	Now				Future Desired Lifestyle		
	Current Lifestyle		Survivor's Lifestyle		At Selected Retirement		Post Age 75/80
Housekeeping Expenses					<i>NOTE: In today's pounds please!</i>		
Electricity							
Gas							
Water Rates							
Council Tax							
Home Telephone							
Repairs & Renewals							
Solid Fuel							
Oil							
Garden/Gardener/Plants etc							
Help in House							
House & Contents Insurance							
Other Insurance							
TV Licence							
Sky / Digital TV/ Modems							
Swimming Pool / Tennis Court Maintenance							
Any Other Expenses							
Alarm							
Internet							
Housekeeping, Food., etc							
Wines & Spirits							
Laundry & Dry Cleaning							
Pet Foods							
Holiday Home Expenses							
Other Private Annual Expenses (e.g. Yacht/Helicopter/Plane etc)							
TOTAL							
Children & Grandchildren Expenses							
Childcare / Baby Sitters							
Clothing & Footwear							
Education Expenses							
Pocket Money							
Other Children's Expenses							
TOTAL							
Personal Expenses							
Own Clothing & Footwear							
Partner's clothing & footwear							
Cigarettes & tobacco							
Eating Out							
Christmas & Birthday presents							
Holidays							
Subscriptions (Excl. AA/RAC etc)							
Sports / Hobbies							
BUPA/PPP/WPA Health Insurance							
Mobile Phones							
CD's/Books/Newspapers							
Other Misc. Spending Money							
Gifts to Charities							
Travelling Expenses other than Motoring							
Other Personal Expenses							
TOTAL							

	Now			Future Desired Lifestyle		
	Current Lifestyle		Survivor's Lifestyle	At Selected Retirement		Post Age 75/80
Cost of Servicing Debts						
Mortgage on Main Residence						
Mortgage on other property						
Hire Purchase						
Bank Loans						
Bank Charges						
Maintenance Payments						
Other Similar Expenses						
TOTAL						

Motoring Expenses						
Car Tax						
Car Insurance						
Petrol & Oil						
Servicing & Repairs						
AA/RAC subscription						
Annual Depreciation						
Other Motoring Expenses						
TOTAL						

Investment & Life Assurance						
Life Assurance Premiums						
Endowment Premiums						
Pension Contributions						
Regular Saving in Building Society						
Regular Saving in ISA's etc						
Other savings & investment						
TOTAL						

Professional Fees						
Accountants fees (non business)						
Dentist's fees						
Doctor's fees / prescriptions						
Financial Planners fees						
Optician's fees						
Osteopath / Chiro Fee's						
Veterinary Surgeon's Fees						
TOTAL						

PLEASE NOTE: THERE IS NO NEED FOR YOU TO ADD THESE COLUMNS UP, WE WILL DO THAT FOR YOU!

OVERALL SUMMARY	Current Lifestyle		Survivor's Lifestyle		At Selected Retirement		Post Age 75/80
Housekeeping Expenses							
Children & Grandchildren Expenses							
Personal Expenses							
Cost of Servicing Debts							
Motoring Expenses							
Investment & Life Assurance							
Professional Fees							
OVERALL TOTAL - Per Annum							