

PERSONAL ASSET AND LIABILITY STATEMENT

Name

Where assets/liabilities are jointly held, please asterisk(*)

PRIVATE DWELLING

Address Value £

Lender

Account Number Monthly Payment £ O/s mortgage £

CASH RESOURCES

Bank/Building Society Account Number Amount £

Bank/Building Society Account Number Amount £

STOCKS AND SHARES (quoted)

Company Number of shares Value £

Company Number of shares Value £

LIFE POLICIES

Company Policy Number Surrender value £

Company Policy Number Surrender value £

OTHER INCOME/ASSETS

OTHER BORROWING/LIABILITIES (including Guarantees)

(Please quote purpose, lender, term and repayments)

We hereby certify that this is a true and accurate record of our assets and liabilities.

Signature(s) (dd/mm/yy) (dd/mm/yy)

1. Date / /

2. Date / /

If you own any investment properties please complete the schedule on the reverse of this form. Please ensure all properties owned are detailed.

FOR OFFICE USE ONLY

Total Assets £
(Excluding rent)

Total Liabilities £

