



Income & Expenditure Form

When completing this form please gather, refer to and enclose the requested documents listed on page 4. Don't worry if you are unsure of some fields or they aren't relevant – complete what you can and move onto the next step.

Personal Information

	Borrower 1	Borrower 2 (if applicable)
Name	<input type="text"/>	<input type="text"/>
Account number	<input type="text"/>	<input type="text"/>
Mobile Number	<input type="text"/>	<input type="text"/>
Alternative Phone Number	<input type="text"/>	<input type="text"/>
Email Address	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/>	<input type="text"/>
No of children & ages	<input type="text"/>	<input type="text"/>
Employment Status	<input type="text"/>	<input type="text"/>
Employer Name	<input type="text"/>	<input type="text"/>
Job Title	<input type="text"/>	<input type="text"/>

Income & Expenditure

	Monthly	Monthly
INCOME		
Basic Net Salary/Pension	<input type="text"/>	<input type="text"/>
Child Benefit	<input type="text"/>	<input type="text"/>
Child Tax Credits	<input type="text"/>	<input type="text"/>
Income Support	<input type="text"/>	<input type="text"/>
Unemployment	<input type="text"/>	<input type="text"/>
Invalidity	<input type="text"/>	<input type="text"/>
Housing	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
Investment income/share dividends	<input type="text"/>	<input type="text"/>
Rental income	<input type="text"/>	<input type="text"/>
Total:	<input type="text"/>	<input type="text"/>

Income & Expenditure - Continued

	Borrower 1	Borrower 2 (if applicable)
EXPENDITURE	Monthly	Monthly
Other Mortgages/Rent	<input type="text"/>	<input type="text"/>
Total Loan repayments	<input type="text"/>	<input type="text"/>
Total Credit card (min monthly payments)	<input type="text"/>	<input type="text"/>
Total HP/Leasing Payments	<input type="text"/>	<input type="text"/>
Other Insurance (building/content/life)	<input type="text"/>	<input type="text"/>
Endowment Policies	<input type="text"/>	<input type="text"/>
Travelling Expenses	<input type="text"/>	<input type="text"/>
Rates	<input type="text"/>	<input type="text"/>
Maintenance/Childcare	<input type="text"/>	<input type="text"/>
Household Expenditure	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
Total:	<input type="text"/>	<input type="text"/>

Assets & Liabilities

Assets	Description	Estimated Value
Properties (e.g. personal residence, investment properties, land etc)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Vehicles	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Shares	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Savings	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Endowment Policies (include maturity date)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Assets & Liabilities - Continued

Liabilities	Lender	Monthly Payment	Balance (Approx)	In arrears? (Yes/No)	Expiry Date
HP/Lease	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Loans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Credit Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mortgages	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Signature of Borrower 1 <input type="text"/> Date Day Month Year <input type="text"/> / <input type="text"/> / <input type="text"/>	Signature of Borrower 2 <input type="text"/> Date Day Month Year <input type="text"/> / <input type="text"/> / <input type="text"/>
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Consent to process special category of personal data

Where, in support of this application, I/we have provided information which comes under the definition of special categories of personal data (information regarding Race, Ethnic Origin, Political Opinion, Religious or Philosophical beliefs, Trade Union Membership, Biometric or Genetic Data, Health, Sex Life or Sexual Orientation) and/or information relating to criminal convictions/offences, I/we consent to its storage and use in relation to this application. I/we understand that the information will only be used for this purpose.

I/we may withdraw this consent at any time.

Signature of Borrower 1 <input type="text"/> Date Day Month Year <input type="text"/> / <input type="text"/> / <input type="text"/>	Signature of Borrower 2 <input type="text"/> Date Day Month Year <input type="text"/> / <input type="text"/> / <input type="text"/>
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Please enclose the required documents listed below

- Your last 3 months' payslips or your last 3 years certified accounts if you are self-employed
- Your last 3 months' bank statements for all the accounts you have
- If you have a credit card, your last 3 months' credit card statements
- Evidence of any benefits you receive
- Evidence of any rental income you receive (e.g. a rental agreement)
- Copies of any loan or hire purchase agreements
- Evidence of any savings (i.e. statements) or investments (i.e. policy documents) you have

Checklist

Please tick when included

The requested documents

Complete Income & Expenditure form

Signed consent to process special categories of personal data

Please return to First Trust Bank, Retail Financial Solutions Group, 92 Ann Street, Belfast, BT1 3HH.

What happens next?

- Once you have completed all checklist items and returned documents to First Trust Bank we will contact you to make sure we fully understand your circumstances.
- We we look at your case and work out the best way forward.
- When your case has been reviewed we will contact you to discuss the decision and next steps.



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