

# Financial Statement



## PRIVATE & CONFIDENTIAL

Date:
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Financial Statement of:	
Name 1	
Address 1	
Name 2	
Address 2	

Household	Adults	Children
Number in Household		
Children's Ages		

Monthly Income	Euro
My Total Net Earnings*	
My Partner's Total Net Earnings*	
Total my/partners Social Welfare	
Child Benefit	
Housing supports (HAP,RAS or other payments)	
Family Income Supplement	
Total Pensions	
Total Other Income (give breakdown)	
<b>Total Income</b>	<b>Box A €</b>

Monthly Expenditure	Euro
Rent	
Mortgage	
Mortgage Protection Insurance / Endowment Premium	
Mortgage Payment Protection Insurance	
Property Service / Management Charge	
Buildings / Contents Insurance	
Property Tax	
Water Charges / Group Water Scheme / Septic Tank Costs	
Repair and Maintenance	
Total Second Property Costs (give breakdown)	
Total Third Property Costs (give breakdown)	
Total Food / Housekeeping	
Electricity	
Gas / Heating	
TV Licence	
Waste Charges	
Total Telephone / Other Utilities	
Maintenance paid to spouse / child	
Life Assurance	
Pension Contribution	
Total Transport Costs	
Total Educational Costs	
Childcare/Crèche	
Elderly Care	
Savings / Contingency	
Bank Charges (Current Account)	
Membership /Professional Subs (Please specify)	
Clothing/Footwear	
Total Medical Costs	
Total Other Social Inclusion Expenditure	
<b>Total Expenditure</b>	<b>Box B €</b>

### Notes

* Please remember net earnings are income after tax and government deductions, but before any deductions for credit union, a debt, pension or health insurance etc.
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Money for all Debts Calculation		Euro
Total Income	Box A €	
(less) Total Expenditure	Box B €	
<b>(equals) Money for all Debts</b>	<b>Box C €</b>	

Secondary Debts Calculation		Euro
Money for All Debts	Box C €	
(less) Total priority debt payments	Box D €	
<b>Available Income for Secondary Debts</b>		

Priority Payments / Debts	Balance Owed	Arrears	Priority Debt Payments
Rent			
Mortgage			
Electricity			
Gas/Heating			
Loans Secured on Home			
Other Secured Loans			
Property Tax			
Water Charges / Group Water Scheme / Septic Tank Charges			
Hire Purchase for Car			
Other Priority Payments / Liabilities (please specify)			
Debts to State (e.g. Revenue)			
Family Maintenance			
Second Property			
Third Property			
Instalment Orders			
<b>Total priority debt payments</b>	<b>Box D €</b>		

Secondary Debts	Balance Owed	Payment Offered
<b>Total</b>		

Notes/breakdown of figures

Signed:

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As your financial advisors, we must gather and record sufficient information prior to offering, recommending, arranging or providing a product or service appropriate to you the consumer. The level of information gathered should be appropriate to the nature and complexity of the product or service being sought, but must be to a level that allows us to provide a professional service.