

# EXPENDITURE QUESTIONNAIRE © Prestwood Software Limited 2006

Email Version - Please complete figures, save and email back to us within 7 days. Thank you.

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
<b>Housekeeping Expenses</b>					<i>NOTE: In today's pounds please!</i>		
Electricity	0		0		0		0
Gas	0		0		0		0
Water Rates	0		0		0		0
Council Tax	0		0		0		0
Home Telephone	0		0		0		0
Repairs & Renewals	0		0		0		0
Solid Fuel	0		0		0		0
Oil	0		0		0		0
Garden/Gardener/Plants etc	0		0		0		0
Help in House	0		0		0		0
House & Contents Insurance	0		0		0		0
Other Insurance	0		0		0		0
TV Licence	0		0		0		0
Sky / Digital TV/ Modems	0		0		0		0
Swimming Pool / Tennis Court Maintenance	0		0		0		0
Any Other Expenses	0		0		0		0
Alarm	0		0		0		0
Internet	0		0		0		0
Housekeeping, Food., etc	0		0		0		0
Wines & Spirits	0		0		0		0
Laundry & Dry Cleaning	0		0		0		0
Pet Foods	0		0		0		0
Holiday Home Expenses	0		0		0		0
Other Private Annual Expenses (e.g. Yacht/Helicopter/Plane etc)	0		0		0		0
<b>TOTAL</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>
<b>Children &amp; Grandchildren Expenses</b>							
Childcare / Baby Sitters	0		0		0		0
Clothing & Footwear	0		0		0		0
Education Expenses	0		0		0		0
Pocket Money	0		0		0		0
Other Children's Expenses	0		0		0		0
<b>TOTAL</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>
<b>Personal Expenses</b>							
Own Clothing & Footwear	0		0		0		0
Partner's clothing & footwear	0		0		0		0
Cigarettes & tobacco	0		0		0		0
Eating Out	0		0		0		0
Christmas & Birthday presents	0		0		0		0
Holidays	0		0		0		0
Subscriptions (Excl. AA/RAC etc)	0		0		0		0
Sports / Hobbies	0		0		0		0
BUPA/PPP/WPA Health Insurance	0		0		0		0
Mobile Phones	0		0		0		0
CD's/Books/Newspapers	0		0		0		0
Other Misc. Spending Money	0		0		0		0
Gifts to Charities	0		0		0		0
Travelling Expenses other than Motoring	0		0		0		0
Other Personal Expenses	0		0		0		0
<b>TOTAL</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>

	Now			Future Desired Lifestyle		
	Current Lifestyle		Survivor's Lifestyle	At Selected Retirement		Post Age 75/80
<b>Cost of Servicing Debts</b>						
Mortgage on Main Residence	0		0	0		0
Mortgage on other property	0		0	0		0
Hire Purchase	0		0	0		0
Bank Loans	0		0	0		0
Bank Charges	0		0	0		0
Maintenance Payments	0		0	0		0
Other Similar Expenses	0		0	0		0
<b>TOTAL</b>	<b>0</b>		<b>0</b>	<b>0</b>		<b>0</b>

<b>Motoring Expenses</b>						
Car Tax	0		0	0		0
Car Insurance	0		0	0		0
Petrol & Oil	0		0	0		0
Servicing & Repairs	0		0	0		0
AA/RAC subscription	0		0	0		0
Annual Depreciation	0		0	0		0
Other Motoring Expenses	0		0	0		0
<b>TOTAL</b>	<b>0</b>		<b>0</b>	<b>0</b>		<b>0</b>

<b>Investment &amp; Life Assurance</b>						
Life Assurance Premiums	0		0	0		0
Endowment Premiums	0		0	0		0
Pension Contributions	0		0	0		0
Regular Saving in Building Society	0		0	0		0
Regular Saving in ISA's etc	0		0	0		0
Other savings & investment	0		0	0		0
<b>TOTAL</b>	<b>0</b>		<b>0</b>	<b>0</b>		<b>0</b>

<b>Professional Fees</b>						
Accountants fees (non business)	0		0	0		0
Dentist's fees	0		0	0		0
Doctor's fees / prescriptions	0		0	0		0
Financial Planners fees	0		0	0		0
Optician's fees	0		0	0		0
Osteopath / Chiro Fee's	0		0	0		0
Veterinary Surgeon's Fees	0		0	0		0
<b>TOTAL</b>	<b>0</b>		<b>0</b>	<b>0</b>		<b>0</b>

<b>OVERALL SUMMARY</b>	Current Lifestyle		Survivor's Lifestyle		At Selected Retirement		Post Age 75/80
Housekeeping Expenses	0		0		0		0
Children & Grandchildren Expenses	0		0		0		0
Personal Expenses	0		0		0		0
Cost of Servicing Debts	0		0		0		0
Motoring Expenses	0		0		0		0
Investment & Life Assurance	0		0		0		0
Professional Fees	0		0		0		0
<b>OVERALL TOTAL - Per Annum</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>