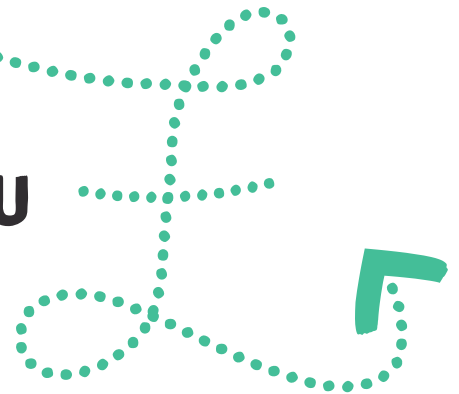


# YOUR FINANCES – HELPING US TO HELP YOU



Before you speak with our adviser it would be really helpful if you could complete as much of the following information as possible. This will help us to provide you with the correct advice, and to ensure that we identify the best way of meeting your objectives.

Our adviser will run through this information with you when you speak with them.

## Your income:

### Customer 1

### Customer 2

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Income (after tax)	Customer 1	Customer 1				Customer 2	Customer 2				Joint (if applicable)	Joint (if applicable)			
		Weekly	Monthly	Quarterly	Annually		Weekly	Monthly	Quarterly	Annually		Weekly	Monthly	Quarterly	Annually
Earned income	£					£					£				
Pension (State)	£					£					£				
Pension (other)	£					£					£				
Investment income	£					£					£				
Investment withdrawals	£					£					£				
Rental income	£					£					£				
Other income (explain in notes section)	£					£					£				
State benefits (other than State Pension)	£					£					£				

**Notes:**

## Your outgoings:

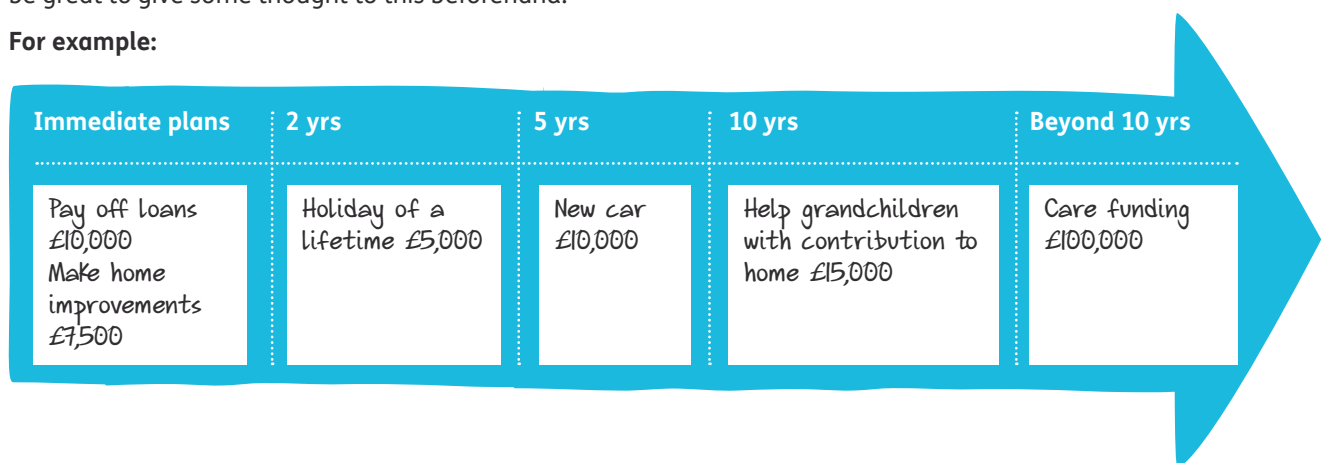
All the information below should cover total household expenditure:

Outgoings (per month)	Amount	Outgoings (per month)	Amount
Mortgage	£	House repairs and maintenance	£
Rent / service charge / ground rent	£	Clothing / footwear	£
Credit cards	£	Children / grandchildren	£
Loans / hire purchase agreements	£	Travel costs (e.g. car fuel / bus / taxi)	£
Council Tax (after any reductions)	£	Car / vehicle maintenance (e.g. MOT / servicing / repairs)	£
Water rates	£	Home insurance	£
Electricity / gas / other heating costs	£	Other insurances (e.g. pet / life / pension / health)	£
Telephone / mobile telephone / internet	£	Leisure / recreation / holidays	£
Household (e.g. food and toiletries)	£	Other (e.g. smoking / socialising)	£
Television (e.g. Sky TV etc)	£	<b>Total monthly outgoings</b>	<b>£</b>

## Future spending plans:

You've already told us why you're looking to take out equity release. But to help us with recommending the right product for you we'll need to understand what 'big' expenses (separate from your day-to-day expenses), you might have coming up over the next few years. Our adviser will talk to you about these, but if you have the time it would be great to give some thought to this beforehand.

**For example:**



## FOR MORE INFORMATION:

**Call: 0800 015 0993**

Our UK based team is available from 9am to 5pm, Monday to Friday (excluding bank holidays). Calls are monitored for training and regulatory purposes.

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