Penguin

Plan - Perform - Protect

Expenses Questionnaire
Confidential Financial Review

IMPORTANT: PLEASE ENTER YOUR DATA DIRECTLY INTO THIS PDF

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Name: _____   **Date Completed:** _____

Financial Planning Questionnaire
Confidential Financial Review

Annual Expenditure Analysis Per Year

Item	Amount	
Basic - Home	**Monthly**	**Annual**
Mortgage/rent		
Council tax		
Water		
Electricity		
Gas		
TV - Satellite		
Alarm Security		
Home telephone internet		
Mobiles		
Home insurance/contents		
Food and housekeeping		
Cleaning		
Property maintenance		
Garden maintenance		
Sub-total		

Basic - Vehicles	**Monthly**	**Annual**
Car depreciation or payment		
Petrol/diesel		
Servicing and maintenance		
Car Insurance		
Car Other		
Sub-total		

Item	Amount	
Basic - Personal	**Monthly**	**Annual**
Clothing		
Wines/spirits alcohol		
Magazines - Subscriptions		
Beauty/grooming		
Public transport/taxis		
Childcare		
Cigarettes		
Charitable donations		
Gifts		
Pets		
Sub-total		

Basic - Medical	**Monthly**	**Annual**
Private medical insurance		
Dentist		
Optician		
Sub-total		

Luxury	**Monthly**	**Annual**
School Fees		
Sub-total		

Item	Amount	
Leisure	**Monthly**	**Annual**
Sports/hobbies		
Holidays and travel		
Entertainment		
Eating out		
Cash withdrawals		
Sub-total		

Milestones - e.g World Cruise 2022 £30,000.

Sub-total	

Totals

Basic _____

Leisure _____

Luxury _____

Grand Total _____

Advisors Note: Not currently importable.