

## Existing Customer Affordability Assessment

The information you complete on this form will allow us to review your current financial position, this will ensure the help we provide you will be tailored to your individual needs. Therefore, it is important that the figures you provide us are accurate and that all income and expenditure is recorded as accurately as possible.

| About You  | Customer 1 | Customer 2 |
|--|------------|------------|
| Your Full Name   |            |            |
| Date of Birth  |            |            |
| Mortgage Account Number  |            |            |
| Mortgage Property Address  |            |            |
| Correspondence Address (complete if different from the property address) | Postcode   |            |

| Contact Numbers | Customer 1 | Customer 2 |
|-----------------|------------|------------|
| Home            |            |            |
| Mobile          |            |            |
| Email           |            |            |

| About Your Household   |  |
|--|--|
| Number of adults in the household (including yourself)                               |  |
| Number of children under the age of 14 (dependent upon or living with you)           |  |
| Number of children between the ages of 14 and 18 (dependent upon or living with you) |  |
| Number of vehicles in household  |  |

| About Your Employment              | Customer 1 | Customer 2 |
|------------------------------------|------------|------------|
| Occupation                         |            |            |
| Industry / Job Sector              |            |            |
| Permanent / Temporary / Unemployed |            |            |

### Step 1: Income

Complete with monthly figures only

|   |                       |                                |                       |
|---|-----------------------|--------------------------------|-----------------------|
| <b>About Your Household Income</b>          | <b>Monthly Amount</b> | <b>Savings and Investments</b> | <b>Monthly Amount</b> |
| Your take home pay (Net Salary): Customer 1 |                       | Type .....                     |                       |
| Your take home pay (Net Salary): Customer 2 |                       | Type .....                     |                       |
| Job seekers allowance                       |                       | Type .....                     |                       |
| Income support / Pension credit             |                       | Type .....                     |                       |
| Working family tax credit                   |                       |                                |                       |
| Child tax credit                            |                       |                                |                       |
| Child benefit                               |                       |                                |                       |
| Disability allowance                        |                       |                                |                       |
| Maintenance                                 |                       |                                |                       |
| Retirement pension                          |                       |                                |                       |
| Invalidity sickness benefit                 |                       |                                |                       |
| Bonuses                                     |                       |                                |                       |
| Non-dependant's contribution                |                       |                                |                       |
| Income from Lodgers                         |                       |                                |                       |
| Other benefits (please give details)        |                       |                                |                       |
|   |                       |                                |                       |
| <b>Total Income (Figure A)</b>              |                       |                                |                       |

  

| ASU Policy                      | Details |
|---------------------------------|---------|
| Provider                        |         |
| Term                            |         |
| Remaining Term of current claim |         |
| Payment                         |         |

**Please note:** where customers are in receipt of Disability Allowance the customer has the right for this amount to be excluded from their income. If they declare this amount and wish for it to be included in their income this amount can be used to assess their full income and expenditure.

