

CashCalc

Financial Planning Tools

Data Capture form
for

Created by

Personal Details

Required info	Your details	Partner details
Title:		
Full name:		
Date of birth:		
Gender:		
Marital status:		
Home phone:		
Mobile phone:		
Email address:		

Address

Address	County	Postcode	Country

Employment Details

Required info	Your details	Partner details
UK domiciled:		
UK resident for tax:		
National Insurance number:		
Employment status:		
Desired retirement age:		
Occupation:		
Employer:		
Annual gross salary:		
Time employed:		
Highest rate of tax paid:		
Child benefit reduced:		

Additional notes or comments

Incomes

Income source name	Approx. monthly net income
	Total:

Additional notes or comments

Expenditure

Expense	Monthly expense now	Monthly expense in retirement
Mortgage/Rent		
Credit Cards		
Loans		
Finance/Hire Purchase		
Council Tax		
Electricity		
Gas		
Water		
TV Licence		
Broadband/Landline/TV		
Fuel		
Motoring Insurance		
Motoring Tax		
Motoring Maintenance		
Food/Housekeeping		
Clothing		
Holidays		
Savings		
Socialising/Entertainment		
Meals Out/Takeaways		
Dental		
Optician		
Accountant		
Solicitor		
Financial Advice		
Insurance		
	Total:	Total:

