

CashCalc

Financial Planning Tools

Data Capture form
for

Created by

Personal Details

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

Addresses

Address	County	Postcode	Country

Dependants

Name	Relationship	Date of birth	Dependant until

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:

Other expenditure

Other expenses	Monthly expense now	Monthly expense in retirement
	Total:	Total:

Additional notes or comments

Pensions

Owner	Plan type	Plan provider	Plan value	Policy number

Additional notes or comments

Savings & Investments

Owner	Plan provider	Value	Policy number

Additional notes or comments

Other assets

Owner	Asset description	Value

Additional notes or comments

Liabilities

Owner	Liability type	Outstanding value	Monthly cost	Remaining term

Specific mortgage or borrowing requirements:

Health and protection details

Required info	Your details	Partner details
State of health:		
Smoker (last 12 months):		
Long term care needed:		

Protection policies

Holder	Type	Sum assured	Monthly payment	Company name	In trust	End date

Additional notes or comments

Objectives

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Agreed actions

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