

Assets and Liabilities Form

Please complete and sign one form per customer or couple living together and/or guarantor(s).

Applicant(s) and/or Guarantor(s) name(s): _____

National Insurance Nos

Person 1

Person 2

Assets

Property – your home £ _____

Property – other £ _____

Address: _____

Property – other £ _____

Address: _____

Property – other £ _____

Address: _____

Value of business(es) owned £ _____

Name/nature of business(es): _____

Other shares £ _____

Bank/Building Society deposits £ _____

£ _____

£ _____

Other assets e.g. vehicles,
significant jewellery £ _____

Total assets £ _____

Liabilities

Mortgage – your home £ _____

Mortgage – other £ _____

Lender: _____

Mortgage – other £ _____

Lender: _____

Mortgage – other £ _____

Lender: _____

Loan outstanding 1 £ _____

Lender: _____

Loan outstanding 2 £ _____

Lender: _____

Loan outstanding 3 £ _____

Lender: _____

Overdraft/credit/store card balances £ _____

£ _____

Hire purchase £ _____

Other liabilities £ _____

Total liabilities £ _____

Have your **net** assets over the previous financial year (excluding your main residence) exceeded £500,000? ☐ Yes ☐ No

Signed: _____

Print name: _____

Date: _____

Signed: _____

Print name: _____

Date: _____