

APPENDIX 2- EXAMPLE INCOME & EXPENDITURE FORM

Customer:		Ref:	Period	Amount	Weekly	Monthly	Note
Expenditure							
			W	15.34	£15.34	£66.47	
					£0.00	£0.00	
					£0.00	£0.00	
					£0.00	£0.00	
				0.00	£0.00	£0.00	Use only one line for water rates
			M	24.00	£5.54	£24.00	Use only one line for water rates
	Insurance - endowment, contents	OTH			£0.00	£0.00	
	Travel expenses	TRA			£0.00	£0.00	
	Meals at work	OTH			£0.00	£0.00	
	Fuel (NOT petrol)				£0.00	£0.00	
	Gas		M	50.00	£11.54	£50.00	
	Electricity		M	50.00	£11.54	£50.00	
	Loans/credit cards				£0.00	£0.00	
	Private pension payments				£0.00	£0.00	
	Court fines				£0.00	£0.00	
	Maintenance payments				£0.00	£0.00	
	Hire purchase (car)	TRA			£0.00	£0.00	
	Entertainment	OTH			£0.00	£0.00	
	Housekeeping	HKP	M	30.00	£6.92	£30.00	
	Food	HKP	M	120.00	£27.69	£120.00	
	Baby food/mix	HKP			£0.00	£0.00	
	Toiletries	HKP	M	10.00	£2.31	£10.00	
	Nappies	HKP			£0.00	£0.00	
	Health care e.g. prescriptions	OTH	M	28.00	£6.46	£28.00	
	Laundry/dry cleaning	HKP			£0.00	£0.00	
	Cleaning materials	HKP	M	15.00	£3.46	£15.00	
	Newspapers/magazines	HKP			£0.00	£0.00	
	Cigarettes	HKP	W	10.00	£10.00	£43.33	
	Alcohol	HKP			£0.00	£0.00	

Clothing	HKP			£0.00	£0.00
School meals	OTH			£0.00	£0.00
School trips	OTH			£0.00	£0.00
Childcare				£0.00	£0.00
TV licence		M	12.13	£2.80	£12.13
Colour TV assumed - delete amount if no TV, or 4.08 if B&W					
Internet/cable/Sky	OTH	M	18.50	£4.27	£18.50
Furniture	OTH	M	10.00	£2.31	£10.00
Phone - landline/mobile/other	PHO	M	15.00	£3.46	£15.00
Holidays	OTH			£0.00	£0.00
Payments to arrears - rent, council tax, utilities	OTH	M	50.00		£50.00
made as the result of a court order, direct deductions from benefit, or are evidenced as priority debts in a financial statement from advice centre or debt advice service. Change CFS code in column B if					
Other (please state) Repairs	OTH			£0.00	£0.00
housekeeping, travel or phone Change CFS code in column B if					
Other (please state)	OTH	M	31.00	£7.15	£31.00
housekeeping, travel or phone					
Total				£120.79	£573.44
Income					Expenditure exceeds income
Wages		M	398	£91.85	£398.00
Wages (partner)				£0.00	£0.00
JSA				£0.00	£0.00
IS				£0.00	£0.00
ESA				£0.00	£0.00
State retirement pension				£0.00	£0.00
Sick pay / maternity pay				£0.00	£0.00
Rent from lodger				£0.00	£0.00
Money from non dependant				£0.00	£0.00
Pension credit				£0.00	£0.00
Tax credits				£0.00	£0.00
Child benefit				£0.00	£0.00

Maintenance	£0.00	£0.00
DLA / PIP	£0.00	£0.00
Occupational pension	£0.00	£0.00
Carer's Allowance	£0.00	£0.00
Student income	£0.00	£0.00
Income from savings / investments (total)	£0.00	£0.00
Other (please state) SDA	£0.00	£0.00

Total £91.85 £398.00 **Expenditure exceeds income**

Summary	Summary	Weekly	Monthly	Status	
Weekly income	£91.85				
Weekly expenditure	£120.79	Water (me)	£0.00	£0.00	OK
Balance	-£28.95	Water (unr)	£5.54	£24.00	OK
Expenditure exceeds income		Gas	£11.54	£50.00	OK
		Electricity	£11.54	£50.00	Above average electricity costs
		Housekeep	£50.38	£218.33	OK
		Travel	£0.00	£0.00	OK
		Phone	£3.46	£15.00	OK
		Other	£20.19	£137.50	OK

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