

Personal Assets and Liabilities

Customer details

Full Name(s)

Address

 Postcode

Assets

	Address (if applicable)	Value
Residential property(ies) (Not inc BTL)		£
Overseas property(ies)		£

	Description	Value
Cash / deposit accounts		£
Stocks & Shares		£
Vehicles / boats etc.		£
Business equipment / plant and machinery		£
Art / jewellery / antiques		£
Other		£
Total Assets		£

Liabilities

Address (if applicable)		Value
Residential property loan(s) (Not inc BTL)		£
Overseas property loan(s)		£
Description		Value
HP/ Leasing		£
Overdraft		£
Other bank / finance company loans		£
Other		£
Total Liabilities		£
Net Assets (Assets minus Liabilities)		£