

Net worth statement

Statement of personal assets and liabilities

Please complete a separate statement for each household within the application.

Name

Account number

Assets

Home residence value

Second home value

Other UK properties value
(totals from schedule)

Non-UK properties value*

Cash resources
(bank, building society/cash, etc)

Stocks and shares

Endowment/Life policies
(estimated surrender values)

Other investments*
(bonds/gilts, cars or other vehicles etc)

Other significant assets*
(boats, land, commercial premises etc)

Total assets

Net worth

Assets less liabilities

Liabilities

Home mortgage balance

Second home mortgage

Other UK mortgage balances
(totals from schedule)

Non-UK mortgages*

Bank loans/Overdraft balance

Other loans/HP balance

Credit/Charge/Store cards balance

Income/Property tax you owe from the previous year

Guarantees*

Other liabilities*

Total liabilities

Please confirm any liabilities due in the next 12 months, such as tax/VAT

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***Please provide further details here**

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Signature

Date


Signature


Date


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