CashCalc

Financial Planning Tools

Data Capture form

for

Created by

SIP Wealth Management

Chartered Financial Planners

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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

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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

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Incomes

Income source name	Approx. monthly net income
	Total:

Additional notes or comments

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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:

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Other expenditure

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

Additional notes or comments

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Pensions

Owner	Plan type	Plan provider	Plan value	Policy number

Additional notes or comments

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Savings & Investments

Owner	Plan provider	Value	Policy number

Additional notes or comments

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Other assets

Owner	Asset description	Value

Additional notes or comments

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Liabilities

Owner	Liability type	Outstanding value	Monthly cost	Remaining term

Specific mortgage or borrowing requirements:

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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
					NO	
					NO	
					NO	
					NO	
					NO	
					NO	

Additional notes or comments

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Objectives

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Agreed actions

Agreed actions

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