

## Debt Enquiry Sheet

Date	
Adviser	
Bureau Office	

Date of Birth	29/05/69
National Insurance No.	WL 44 62 7* A

Office Use Only

Name	David Bloggs
Partner/Spouse	Julie Bloggs
Address	85 Nowhere Street Notown Nowhereshire
Post Code	NN1 1NN
Telephone	04321 43467**
Mobile	0795656*****

### Employment

Employed       Unemployed       Sick   
 Self Employed       Carer       Retired

### Housing Status

Owner Occupier       ⇒ If Owner Occupier, complete section below:

Rent <input type="checkbox"/>	House Value <input style="width: 80%;" type="text" value="12000"/>
Social <input type="checkbox"/>	O/S Mortgage <input style="width: 80%;" type="text" value="9500"/>
Private <input type="checkbox"/>	2 <sup>nd</sup> Mortgage <input style="width: 80%;" type="text" value="N/A"/>
Board & Lodging <input type="checkbox"/>	Secured Loan <input style="width: 80%;" type="text" value="3000"/>
	Charging Order <input style="width: 80%;" type="text" value="N/A"/>
	LA Redemption <input style="width: 80%;" type="text" value="N/A"/>
	Neg/Pos Equity <input style="width: 80%;" type="text" value="- 5000"/>

### Number of People in Household

Adults	2
Children	1
Non-Dependents / Other	0

### Services

Have you or your spouse served in any of the Armed Forces?  
(Please Specify)

No       Army       Navy       RAF   
 TA       Other

If necessary, can we contact client:	(Y/N)
By phone (including messages)	Y
By post	Y

Priority Debt	Arrears	Legal proceedings - Dates etc. Possession / Eviction / Bailiffs / Charging Orders / Warrants
MORTGAGE	1500	Halifax - 3 months arrears / letter threatening legal action
MORTGAGE 2	N/A	
SECURED LOAN	300	Firstplus - 1 month arrears - letter requesting payment
CHARGING ORDER	N/A	
RENT	N/A	
COUNCIL TAX	400	Liability Order applied for 12/12/09
FINES (Magistrates)	N/A	
ELECTRIC	N/A	
GAS	N/A	
WATER	N/A	
TV LICENCE	N/A	
TAX/VAT	N/A	
HIRE PURCHASE	N/A	
CSA	N/A	
OTHER (inc CCJs)	N/A	
BUSINESS (inc Rates)	N/A	

Non-Priority Debts	Amount	Creditors, CCJs, Collection Agencies, Benefit Deductions, Notes
Credit Cards	10000	Lloyds TSB x2 - minimum payments being paid
Loans	8000	Lloyds TSB £5k (joint) - Nat West £3k - payments behind
Overdrafts	1000	Nat West - wages / income paid into this account
Catalogues	N/A	
Rent (Old Properties)	N/A	
Social Fund	N/A	
Benefit Overpayments	N/A	
Telephone (Old Accounts)	N/A	
TV / Sky Rental (Old Accounts)	N/A	
Tax Credit Overpayments	N/A	
Family & Friends	2500	Mother - not pursuing - pay when we can
Other - slimming club	150	Disputed - account now with collection agency
Approximate Total	21650	

Assets (Cars & Vehicles)	3000	VW Golf - needed for work
Assets (Savings etc.)	200	Premium bonds
Assets (Other inc. Pensions)	5000	Pension Fund

Any Guarantors (Parents etc.)	N	
Any Previous Advice (inc CAB)	Y	National Debtline & Debt Management Company
Bankrupt / IVA / DRO	N	

Reason For Debt	Reduction in income due to spouses loss of employment
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Income	Monthly
Wages / Salary	1000
Wages / Salary	N/A
Income Support / JSA	278.63
Tax Credits	368
Child Benefit	88.66
Pension 1	N/A
Pension 2	N/A
DLA (Care)	N/A
DLA (Mobility)	N/A
Attendance Allowance (AA)	N/A
Maintenance	N/A
Benefits / Other	N/A
Benefits / Other	N/A
<b>Total Income</b>	<b>1753.29</b>

Expenditure	Monthly
Mortgage / Rent / Board	500
Second Mortgage / Secured Loans	300
Council Tax	110
Food / Housekeeping	600
Care Mobility Costs (eg. DLA & AA)	N/A
Electric	65
Gas	80
Other Fuel	N/A
Water	34
TV Licence / Rental	12
Hire Purchase	N/A
Maintenance Payments	N/A
Clothing	50
Telephone	45
Travel / Car Costs / Petrol	135
School Meals	N/A
Insurances	20
Health Costs / Prescriptions	8
Childminding	N/A
Other	N/A
Other	N/A
Other	N/A
Other	N/A

<b>Total Outgoings</b>	<b>1959</b>
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Additional Assistance?  
Examples: Other agencies, Health (inc Macmillan), Charities

Yes  No

Client's GP Surgery: Anytown Health Centre