

Statement of means

Borrower one	
Reference number	<input type="text"/>
Title	<input type="text"/>
First name(s)	<input type="text"/>
Surname	<input type="text"/>
Address	<input type="text"/>
Dependents and ages	<input type="text"/>
Occupation(s)	<input type="text"/>
Employer(s)	<input type="text"/>
Assets (Please insert total values for each heading)	
Property (main residence)	£ <input type="text"/>
Other property (UK)	£ <input type="text"/>
Other property (Non-UK)	£ <input type="text"/>
Life policies (surrender value)	£ <input type="text"/>
Investments (UK)	£ <input type="text"/>
Investments (Non-UK)	£ <input type="text"/>
Cash	£ <input type="text"/>
Other (please provide details on page 2)	£ <input type="text"/>
TOTAL ASSETS	£ <input type="text"/>
Liabilities (Please insert total values for each heading)	
Mortgages / loan on main residence	£ <input type="text"/>
Other property loans (UK)	£ <input type="text"/>
Other property loans (Non-UK)	£ <input type="text"/>
Finance / bank loans	£ <input type="text"/>
Guarantor obligations	£ <input type="text"/>
Other (e.g. credit cards) (please provide details on page 2)	£ <input type="text"/>

Borrower two	
Reference number	<input type="text"/>
Title	<input type="text"/>
First name(s)	<input type="text"/>
Surname	<input type="text"/>
Address	<input type="text"/>
Dependents and ages	<input type="text"/>
Occupation(s)	<input type="text"/>
Employer(s)	<input type="text"/>
Assets (Please insert total values for each heading)	
Property (main residence)	£ <input type="text"/>
Other property (UK)	£ <input type="text"/>
Other property (Non-UK)	£ <input type="text"/>
Life policies (surrender value)	£ <input type="text"/>
Investments (UK)	£ <input type="text"/>
Investments (Non-UK)	£ <input type="text"/>
Cash	£ <input type="text"/>
Other (please provide details on page 2)	£ <input type="text"/>
TOTAL ASSETS	£ <input type="text"/>
Liabilities (Please insert total values for each heading)	
Mortgages / loan on main residence	£ <input type="text"/>
Other property loans (UK)	£ <input type="text"/>
Other property loans (Non-UK)	£ <input type="text"/>
Finance / bank loans	£ <input type="text"/>
Guarantor obligations	£ <input type="text"/>
Other (e.g. credit cards) (please provide details on page 2)	£ <input type="text"/>

Borrower one	
TOTAL LIABILITIES OUTSTANDING	£ <input type="text"/>
TOTAL ASSETS	£ <input type="text"/>
Less TOTAL LIABILITIES	£ <input type="text"/>
NET MEANS	£ <input type="text"/>

Borrower two	
TOTAL LIABILITIES OUTSTANDING	£ <input type="text"/>
TOTAL ASSETS	£ <input type="text"/>
Less TOTAL LIABILITIES	£ <input type="text"/>
NET MEANS	£ <input type="text"/>

Assets and liabilities in detail

Assets	Liabilities
<p>Properties (please detail address, valuation amount and date)</p> <input type="text"/>	<p>Property loans (please detail amount outstanding, name of lender and final repayment date)</p> <input type="text"/>
<p>Life policies (please detail company, surrender value and maturity date)</p> <input type="text"/>	<p>Other finance / bank loans (please detail amount outstanding, name of lender and final repayment date)</p> <input type="text"/>
<p>Investments (please detail company, type of investment and current valuation)</p> <input type="text"/>	<p>Guarantor obligations (please provide details)</p> <input type="text"/>
<p>Cash balances (please detail company, amount and maturity date if applicable)</p> <input type="text"/>	<p>Others (e.g credit cards - please provide details)</p> <input type="text"/>
<p>Other assets (please give details)</p> <input type="text"/>	
<p>ASSETS TOTAL VALUE</p> <p>£ <input type="text"/></p>	<p>LIABILITIES TOTAL VALUE</p> <p>£ <input type="text"/></p>

Borrower one

Annual income

Gross salaries

Other annual income

TOTAL ANNUAL INCOME

Customer declaration

I confirm that the Statement of Means Form has been completed to the best of my knowledge and the information supplied is a reasonable representation of my assets and liabilities.

Signature

Date

Borrower two

Annual income

Gross salaries

Other annual income

TOTAL ANNUAL INCOME

Customer declaration

I confirm that the Statement of Means Form has been completed to the best of my knowledge and the information supplied is a reasonable representation of my assets and liabilities.

Signature

Date

Accountant confirmation

I confirm that the above information provides a true and accurate summary of my client's Statement of Wealth.

Accountancy firm name

Address

Telephone number

Email

Signed

Print name

Date

Membership number

Registered in Firm Name or Individual Name (please specify)

Accountant Qualification (Please tick appropriate box)

<input type="checkbox"/>	Chartered Association of Certified Accountants - ACCA / FCCA	<input type="checkbox"/>	Association of Authorised Public Accountants
<input type="checkbox"/>	The Association of Chartered Certified Accountants	<input type="checkbox"/>	Institute of Financial Accountants
<input type="checkbox"/>	Chartered Institute of Management Accountants - ACMA / FCMA	<input type="checkbox"/>	Institute of Chartered Accountants - ACA / FCA
<input type="checkbox"/>	Chartered Institute of Public Finance Accountants - CPFA		
<input type="checkbox"/>	Non UK - Please confirm qualification & Country		

Company Stamp

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