

Income & Expenditure Template

	Client	Spouse
Name		
Age		
Male or Female		
Married or Single?		
Employed, Self Employed?		
Taxpayer in UK or Scotland?		

Client Income	Reason	Present Value	Rate of increase	Age at first payment	Age at last payment
Source 1	Gross Salary / Profits	£	%		
Source 2	Property Income	£	%		
Source 3	Gross Interest	£	%		
Source 4	Dividends received	£	%		
Source 5	Other (non taxable)	£	%		
Source 6	PCLS	£	%		
Source 7	Gross Pension	£	%		
Source 8	Gross State pen	£	%		

Spouse Income	Reason	Present Value	Rate of increase	Age at first payment	Age at last payment
Source 1	Gross Salary / Profits	£	%		
Source 2	Property Income	£	%		
Source 3	Gross Interest	£	%		
Source 4	Dividends received	£	%		
Source 5	Other (non taxable)	£	%		
Source 6	PCLS	£	%		
Source 7	Gross Pension	£	%		
Source 8	Gross State pen	£	%		

Expenditure	Reason	Present Value	Rate of increase	Age at first payment	Age at last payment
1		£	%		
2		£	%		
3		£	%		
4		£	%		
5		£	%		

Investment	
Amount	£
Net growth rate	%
Inflation	%
Show Inflation adjusted?	Yes / No