

## 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"/>
<b>Assets</b> (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"/>
<b>TOTAL ASSETS</b>	£ <input type="text"/>
<b>Liabilities</b> (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"/>
<b>Assets</b> (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"/>
<b>TOTAL ASSETS</b>	£ <input type="text"/>
<b>Liabilities</b> (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	
<h3>Assets</h3> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Properties (please detail address, valuation amount and date)</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Life policies (please detail company, surrender value and maturity date)</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Investments (please detail company, type of investment and current valuation)</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Cash balances (please detail company, amount and maturity date if applicable)</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Other assets (please give details)</p> </div>	<h3>Liabilities</h3> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Property loans (please detail amount outstanding, name of lender and final repayment date)</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Other finance / bank loans (please detail amount outstanding, name of lender and final repayment date)</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Guarantor obligations (please provide details)</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Others (e.g credit cards - please provide details)</p> </div>
<b>ASSETS TOTAL VALUE</b>	<b>LIABILITIES TOTAL VALUE</b>
<input type="text"/> £	<input type="text"/> £

### 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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