

# Personal Budget

This form is designed to help us to help you. By providing your current budget, we can ensure we are providing you with the right level of support and to help reach a suitable agreement. If you would like any help with completing this form, do not hesitate to contact us on **01635 555 588** or by email at **paymentsupport@newbury.co.uk** and we will be happy to help. If you have your own budget that you use at home or through another organisation, (such as for a Debt Management Plan) let us know.



Name: \_\_\_\_\_ Postcode: \_\_\_\_\_

Account number (leave blank if unknown): \_\_\_\_\_ Contact number: \_\_\_\_\_

House name/number: \_\_\_\_\_ Email: \_\_\_\_\_

Please provide a brief description of your current situation and the impact it is having on your finances:

Please provide a brief description of your future plans and how you feel we could support you (You may want to include a proposal if you have one. Please note that whilst we take your proposal into consideration, it is not a guarantee):

## Income

Applicant 1 Monthly take home	£
Applicant 2 Monthly take home	£
Jobseekers Allowance	£
Income support	£
Pension	£
Child Benefit	£
Maintenance	£
Non-dependent Contribution/Board	£
Tax Credits	£
Other (Please state)	£
<b>Total Income</b>	<b>£</b>

Do you have any credit cards, personal loans, or other debts outstanding? If so, please list below who you owe money to, and if an arrangement has been made:

Who you owe money to (e.g. your Housing Association, bank or financing company)	How much you owe	Offer of additional payment made (if applicable - leave blank if you are not sure)
	£	
	£	
	£	
	£	
	£	

## Expenses

Mortgage (leave blank if unknown)	£
Ground Rent / Service Charge	£
Council Tax	£
Building / Content Insurance	£
Life Insurance	£
Payment Protection Insurance	£
Car Insurance and Tax	£
Electricity / Gas / Other Fuel	£
Water	£
Telephone / mobile	£
TV Licence	£
Entertainment (e.g. TV packages)	£
Food and household expenses	£
Clothing	£
Regular prescriptions	£
Travel (Bus fares, petrol, parking)	£
Child Maintenance payments	£
Childminding / School fees	£
School Meals	£
Loans	£
Credit cards	£
Other (please state)	£
Other (please state)	£
Other (please state)	£
<b>Total Expenditure</b>	<b>£</b>

**By providing us with this form, you are confirming that the above information is correct to the best of your knowledge and you consent to us completing a credit search to verify these details.** We may ask you to provide further information or supporting documents after we have received this form. Please email your completed form to **paymentsupport@newbury.co.uk** or return in the prepaid envelope provided, if applicable.

Newbury Building Society complies with the General Data Protection Regulation (GDPR) and any other applicable data protection legislation. Our Privacy Notice, which has previously been provided to you, sets out the basis on which any personal data we collect from you, or that you provide to us, will be treated. The latest version is available via our website at **www.newbury.co.uk/privacy-notice/**, in any of our branches or by calling us on **01635 555700**.

Newbury Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register number 206077). English Law applies and we will communicate with you in English. We are participants of the Financial Ombudsman Service. We have a complaints procedure which we will provide on request. Most complaints that we cannot resolve can be referred to the Financial Ombudsman Service.