

ECCLESIASTICAL FINANCIAL ADVISORY SERVICES

Independent financial advice from a company you can trust

Budget planner



 **Ecclesiastical**

Financial Advisory Services

Most people know how much they earn but fewer seem to understand where it all goes. Identifying your spending habits with this simple Budget Planner can make it easier to work with your financial adviser to see how your money can be put to better use.

Money going out – monthly

1 Home

	You	Partner	Joint
Rent or mortgage	£	£	£
Building/contents/pet insurance	£	£	£
Council tax	£	£	£
Gas/electricity/water	£	£	£
Telephone/mobile phone	£	£	£
TV licence/cable/digital	£	£	£
Repairs/renewals	£	£	£
Other	£	£	£
Total home	£	£	£

2 Food and clothes

	You	Partner	Joint
Food and groceries	£	£	£
School/work lunches	£	£	£
School uniforms	£	£	£
Clothes/shoes	£	£	£
Other	£	£	£
Total food and clothes	£	£	£

3 Travel

	You	Partner	Joint
Holidays	£	£	£
Public transport	£	£	£
Car tax	£	£	£
Car insurance/breakdown cover	£	£	£
Fuel	£	£	£
Car servicing/maintenance	£	£	£
Other	£	£	£
Total travel	£	£	£

4 Savings

	You	Partner	Joint
Regular savings (bank/building society)	£	£	£
Unit trusts/OEICs/other investments	£	£	£
TESSA/ISA/SAYE	£	£	£
Pension contributions	£	£	£
Endowments	£	£	£
Other	£	£	£
Total savings	£	£	£

5 Financial outgoings

	You	Partner	Joint
Charitable donations	£	£	£
School/university fees	£	£	£
Credit cards	£	£	£
Store cards	£	£	£
Bank charges	£	£	£
Loan/hire purchase repayments	£	£	£
Life/medical/sickness cover	£	£	£
Other	£	£	£
Total financial outgoings	£	£	£

6 Other

	You	Partner	Joint
Newspapers/magazines/books	£	£	£
Entertainment	£	£	£
Fitness/sport/gym	£	£	£
Dentist/optician fees	£	£	£
Other expenses	£	£	£
Total other	£	£	£

Money coming in – monthly**Income**

	You	Partner	Joint
Wages/salary/stipend (after tax)	£	£	£
Benefits	£	£	£
Pension	£	£	£
Interest	£	£	£
Investment income	£	£	£
Maintenance	£	£	£
Contributions (from other people in the household)	£	£	£
Student loan	£	£	£
Rental income	£	£	£
Other	£	£	£
Total in	£	£	£

Final amount – monthly

	You	Partner	Joint
Total in minus (-)	£	£	£
Total out	£	£	£
Equals	£	£	£

Contact us

To find out more, contact Ecclesiastical Financial Advisory Service today, on

0800 107 0190

Lines are open 8:30am – 5:30pm Monday to Friday (excluding bank holidays). We may monitor or record calls to improve our service

You can email us at

getadvice@ecclesiastical.com

Or visit us at

www.ecclesiastical.com/getadvice

Other useful contacts

Ecclesiastical home insurance

0345 777 3322

www.ecclesiastical.com/homeinsurance

Ecclesiastical church insurance

0345 777 3322

www.ecclesiastical.com/churchmatters

If you would like this booklet in large print, braille, on audio tape or computer disc please call us on 0800 107 0190. You can also tell us if you would like to always receive literature in another format.



Financial Advisory Services

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