



Expenditure Questionnaire

Children's Expenses

	First Child		Second Child		Third Child	
Name						
Childcare Fees	£	until age	£	until age	£	until age
Pocket Money	£	until age	£	until age	£	until age
Clothing & Footwear	£	until age	£	until age	£	until age
Other Expenses	£	until age	£	until age	£	until age
Wedding Expenses	£	at age	£	at age	£	at age
University Costs	£	per year	£	per year	£	per year
	at age , for years		at age , for years		at age , for years	

	Fourth Child		Fifth Child		Sixth Child	
Name						
Childcare Fees	£	until age	£	until age	£	until age
Pocket Money	£	until age	£	until age	£	until age
Clothing & Footwear	£	until age	£	until age	£	until age
Other Expenses	£	until age	£	until age	£	until age
Wedding Expenses	£	at age	£	at age	£	at age
University Costs	£	per year	£	per year	£	per year
	at age , for years		at age , for years		at age , for years	

Main Residence

	Amount £	Frequency (e.g. weekly / monthly / annual)	% If One Person Dies	% If Seriously Ill
Electricity	£		100%	100%
Gas	£		100%	100%
Water Rates	£		100%	100%
Council Tax	£		100%	100%
Telephone	£		100%	100%
Repairs & Renewals	£		100%	100%
Solid Fuel	£		100%	100%
Oil	£		100%	100%
Garden/Gardener	£		100%	100%
Help In House	£		100%	100%
Buildings & Contents Insurance	£		100%	100%
TV License	£		100%	100%
Satelite/Cable	£		100%	100%
Swimming Pool Maintenance	£		100%	100%
Internet	£		100%	100%
Other	£		%	%
Other	£		%	%
Other	£		%	%

Other Property

	Amount £	Frequency (e.g. weekly / monthly / annual)	% If One Person Dies	% If Seriously Ill
Electricity	£		%	%
Gas	£		%	%
Water Rates	£		%	%
Council Tax	£		%	%
Telephone	£		%	%
Repairs & Renewals	£		%	%
Solid Fuel	£		%	%
Oil	£		%	%
Garden/Gardener	£		%	%
Help In House	£		%	%
Buildings & Contents Insurance	£		%	%
TV License	£		%	%
Satelite/Cable	£		%	%
Internet	£		%	%
Other	£		%	%
Other	£		%	%
Other	£		%	%

First Car

Owner	Make & Model	Proposed Date of Sale

	Amount £	Frequency (e.g. weekly / monthly / annual)
Road Tax	£	
Petrol & Oil	£	
Insurance	£	
Annual Reduction in Value	£	
Servicing	£	
Recovery Subscription	£	
Other	£	

Second Car

Owner	Make & Model	Proposed Date of Sale

	Amount £	Frequency (e.g. weekly / monthly / annual)
Road Tax	£	
Petrol & Oil	£	
Insurance	£	
Annual Reduction in Value	£	
Servicing	£	
Recovery Subscription	£	
Other	£	

Proposed Future Car - e.g. Retirement Car 1

Owner	Proposed Date of Purchase	Estimated Purchase Cost
		£

	Amount £	Frequency (e.g. weekly / monthly / annual)
Road Tax	£	
Petrol & Oil	£	
Insurance	£	
Annual Reduction in Value	£	
Servicing	£	
Recovery Subscription	£	
Other	£	

Proposed Future Car - e.g. Retirement Car 2

Owner	Proposed Date of Purchase	Estimated Purchase Cost
		£

	Amount £	Frequency (e.g. weekly / monthly / annual)
Road Tax	£	
Petrol & Oil	£	
Insurance	£	
Annual Reduction in Value	£	
Servicing	£	
Recovery Subscription	£	
Other	£	

Other Ongoing Expenditure

	Amount £	Frequency	Whose Expense?	% Ongoing In Retirement	% If One Person Dies	% If Seriously Ill
Housekeeping (Food etc)	£			75%	75%	100%
Wines & Spirits	£		*	100%	50%	50%
Laundry/Dry Cleaning	£			100%	100%	100%
Clothing & Footwear	£			100%	50%	75%
Cigarettes/Tobacco	£		*	100%	50%	50%
Eating Out	£			100%	50%	50%
Mobile Phones	£		*	100%	50%	50%
Christmas & Birthdays	£			100%	75%	100%
Holidays	£			100%	50%	50%
Subscriptions	£		*	100%	50%	100%
Sports & Hobbies	£		*	100%	50%	50%
Pocket Money	£		*	100%	50%	75%
Gifts To Charities	£			100%	50%	50%
Unforeseen Expenditure	£		*	100%	50%	125%
Other	£		*	%	%	%
Other	£			%	%	%
Other	£			%	%	%

Other One-Off Expenses

Details	Amount	When?	Whose Expense?	% If One Person Dies	% If Seriously Ill
	£			%	%
	£			%	%
	£			%	%
	£			%	%