Name of Services User: Address of Service User:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| INCOME | WEEKLY (W) MONTHLY (M) | EXPENDITURE | WEEKLY (W)  MONTHLY (M) | METHOD OF PAYMENT |
| Housing Benefit |  | Rent/Mortgage |  |  |
| Council Tax Benefit |  | Council Tax |  |  |
| Child Benefit |  | Water Rates |  |  |
| Income Support |  | **Housekeeping Information** |  |  |
| Carer Allowance |  | Gas/Oil/Coal |  |  |
| Attendance Allowance |  | Electricity |  |  |
| Incapacity Benefit |  | Telephone |  |  |
| Disability Benefit |  | TV Licence/Rental |  |  |
| State Pension |  | Care Charges |  |  |
| Private Pension |  | Funeral Plan |  |  |
| Maintenance |  | Contents Insurance |  |  |
| Any Other Income |  | Life Insurance |  |  |
|  |  | Laundrette costs |  |  |
|  |  | Food Expenses |  |  |
|  |  | Clothing |  |  |
|  |  | Travel Costs |  |  |
|  |  | Vet Bills |  |  |
|  |  | Other |  |  |
|  |  | Spectacles |  |  |
| TOTAL |  | TOTAL |  |  |
|  |  |  |  |  |

# BANK AND BUILDING SOCIETY AND INVESTMENT ACCOUNTS

|  |  |
| --- | --- |
| Name of Bank |  |
| Type of Account |  |
| Other Investments |  |
|  |  |
| Is there a Will and where is it kept? |  |
| If owner occupier, who has the Deeds? |  |