

### Applicant Details

Name	Account holder 1:  Account holder 2:
Mortgage account number	
Address	
Postcode	
Phone number	
Email address	
Preferred contact method	Phone Email Postal
Number of occupants in the household (Please include yourself)	
Age(s) of household occupants	

### All Household Income

	Account holder 1	Account holder 2
Monthly income AFTER tax	£	£
Pension	£	£
Child benefits	£	£
Maintenance	£	£
Other Income	£	£
<b>Total Monthly Income for BOTH Account holders</b>	£	

### Household Unsecured Debt *(This includes Credit cards, Loans, Store Cards, HPI agreements etc)*

Creditor Name	Balance outstanding	Arrears	Current or reduced monthly payment
	£	£	£
	£	£	£
	£	£	£
	£	£	£
	£	£	£
	£	£	£
<b>Total Unsecured</b>	£	£	£

### Monthly Household outgoings

For any additional monthly payments, please use the "Other" fields in each section that best suits the payment type. If they don't fit into any particular section, please include them in the "All Other Monthly Outgoings" section.

Household Bills	Monthly Cost
Mortgage or Rent *	£
Mobile Phone Bills	£
Gas *	£
Electricity *	£
Water *	£
TV, Broadband & Home Phone	£
Waste Removal	£
Maintenance or Repairs	£
Council Tax *	£
Other:	£
Other:	£
<b>Total</b>	£

Transport Costs	Monthly Cost
Vehicle Payments	£
Bus/Train/Taxi Fare	£
Vehicle Insurance/ Tax/ MOT	£
Vehicle Licensing	£
Fuel Costs	£
Maintenance	£
Other:	£
Other:	£
<b>Total</b>	£

Insurance	Monthly Cost
Home Cover *	£
Medical Cover	£
Life Cover	£
Other:	£
Other:	£
<b>Total</b>	£

Other Household Costs	Monthly Cost
Food & Drink	£
Child Care (Include nursery fees, school fees, school dinner costs etc)	£
Entertainment Subscription Services (Include Video, Music, Game Subscription Services etc)	£
Other:	£
Other:	£
<b>Total</b>	£

Payments Into Other Savings & Investments	Monthly Cost
Savings account(s)	£
Pension	£
Investments account(s)	£
Other:	£
Other:	£
<b>Total</b>	£

All Other Monthly Outgoings	Monthly Cost
Other:	£
Other:	£
Other:	£
Other:	£
Other:	£
<b>Total</b>	£

\* These marked payments are classed as Priority Debts. If you are struggling to meet your financial commitments, you should prioritise your payments and pay all your Priority Debts/bills first.

Total monthly outgoings	Monthly Cost
Household Bills	£
Other Household Costs	£
Insurance Costs	£
Transport Costs	£
Savings & Investments	£
All Other Monthly Costs	£
<b>Total Monthly Household Outgoings</b>	£

Monthly Household Budget Left Over

Funds left over after all bills, unsecured debts and outgoings have been paid	Total Monthly Income Value	-	Unsecured Debt Monthly Repayments	-	Total Monthly Household Outgoings	=	Monthly Household Budget
	£		£		£		£

Mortgage Payment Proposals

Please ensure that all non-priority creditors are approached for reduced payments before your Mortgage lender. Please consider seeking independent debt advice with debt support organisations.

Proposed mortgage payments	£
Please confirm your change in circumstances that that have lead you to request support	

This is a true and accurate record of my/our financial position at today's date and I/We make it in the knowledge that if necessary it may be placed before a court:

Account Holder 1

Signature						
Dated	D	D	M	M	Y	Y

Account holder 2

Signature						
Dated	D	D	M	M	Y	Y

Please note: We will require the latest TWO months bank statements to evidence your declared income and expenditure in this document. These documents, along with this form, can be uploaded directly to our secure upload portal here: <https://srbs.co.uk/contact-us/secure-mortgages/>

If you need any help with any sections of this form, please don't hesitate to contact us via:

**In person:** 4 Market Square, Stafford, ST16 2JH  
**Phone:** 01785 223 212\*  
**Email:** [mortgagesupport@srbs.co.uk](mailto:mortgagesupport@srbs.co.uk)  
**Online:** [www.srbs.co.uk](http://www.srbs.co.uk)



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