

Income and expenditure

Your information

We collect and process various categories of personal and financial information throughout your relationship with us, to allow us to provide our products and services and to run our business. For more information about how we use your personal information, the types of information we collect and process and the purposes for which we process personal information, please read our Privacy Notice provided on our website at iombank.com/global/privacy-notice.html.

We may update this from time to time and would encourage you to visit our website regularly to stay informed of the purposes for which we process your information and your rights to control how we process it.

Customer details

Date	<input type="text" value="DDMMYYYY"/>	
Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="checkbox"/> If other, please specify <input type="text"/>	
Surname	<input type="text"/>	
First name(s)	<input type="text"/>	
Full residential address line 1	<input type="text"/>	
Address line 2	<input type="text"/>	
Address line 3	<input type="text"/>	
Address line 4	<input type="text"/>	
Postcode	<input type="text"/> <input type="text"/>	
Telephone number Home	<input type="text"/>	
Telephone number Mobile	<input type="text"/>	
Account number	<input type="text"/> Sort code <input type="text"/>	
Name of Employer (s)	<input type="text"/>	
Position at employer (s)	<input type="text"/>	
Number of Dependents	<input type="text"/>	

Monthly income

	£		£
Principal applicant's net salary	<input type="text"/>	Benefits (e.g Family, Child Support)	<input type="text"/>
Joint applicant's net salary	<input type="text"/>		<input type="text"/>
Bonus/Commission/ Overtime	<input type="text"/>	Other debts / liabilities	<input type="text"/>
Income from savings/ Investments	<input type="text"/>	If any of your liabilities are Interest Only, how do you plan to repay them?	<input type="text"/>
Other source of income	<input type="text"/>		<input type="text"/>
		Total (A)	<input type="text"/>

Monthly expenditure

Household expenses

£

House insurance

Local authority rates/
Council/Property tax

Water

Gas

Electric

Oil/Fuel

Telephone/Mobile
/Internet

Property maintenance

Travel expenses
e.g parking/petrol

Car services/Repairs

Leisure/recreation
/entertaining

Other property costs e.g
Ground rent/Service charge

Domestic help/Child minder/
School/Nursery fees

Food/Other expenditure

TV rental/Licence
/Satellite subscription

Clothing

Holidays

Other

Commitments

£

Mortgage/Rent

Healthcare

Pension contributions
/Premiums

Life cover premiums

Maintenance payments

Car tax and insurance

Loans/Hire purchase

Credit card and
store card payments

Savings and
investment payments

Total (B)

Savings and investments

£

Bank

Building society

Shares

Pensions

Endowment plans

ISA/SAYE

Total

Property value

Mortgage outstanding

Other property values

Other mortgages

Total

Savings and investments are not classed as expenditure when calculating free income

**Total monthly
income (A)**

**Total monthly
expenditure (B)**

Free income (A-B)

Other debts / liabilities

Creditor(s)	Amount owed	Monthly repayment	Expiry date
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
Total other debts	£	£	

Monthly repayment total to tally with Personal Loan/Credit Card repayments in Monthly Expenditure section

If any of your liabilities are Interest Only, how do you plan to repay them?

Offer of repayment

I offer to pay £ per month on

Additional details

The Royal Bank of Scotland International Limited trading as Isle of Man Bank (Isle of Man Bank). Registered Office: Royal Bank House, 71 Bath Street, St Helier, Jersey JE4 8PJ. Tel. 01534 282850. Regulated by the Jersey Financial Services Commission.

Isle of Man business address: 2 Athol Street, Douglas, Isle of Man, IM99 1AN. Tel. 01624 637000. Licensed by the Isle of Man Financial Services Authority in respect of Deposit Taking, Investment Business and registered as a General Insurance Intermediary.

IOM 126 August 2024