

## Applicant's Assessment Form

Please complete in full

Name	
Address	
Postcode	
Home Phone	
Work Phone	
Mobile	
email	
Date of Birth	
Female, Male, Other (please state), Prefer not to say	
Dependent children or adults? If so, please give details (ages)	
Are you willing to allow CPAT to use an anonymised version of your case history?	
How did you hear of us, Website, Poster, Flyer, GP, Therapist, Word of mouth, Other (please state)	
Interviewed by (initials)	
Date of Interview	

I give my consent for CPAT to hold written or electronic records relating to my contact with them. I understand that this information is kept in a secure place and that I am entitled under the Data Protection Act to have access to it upon request.

Applicant's Signature and Date

**Income (per month)<sup>i</sup>**

Pay (after tax)	
Ditto partner	
Income from self-employment	
Statutory Sick Pay	
Statutory Maternity Pay	
Jobseeker's Allowance	
Income Support	
Working Tax Credit	
Child Tax Credit	
Child Benefit	
Employment and Support Allowance (or Incapacity Benefit)	
Universal Credit	
Disability Living Allowance (or Personal Independence Payment)	
Attendance Allowance	
Carer's Allowance	
Housing Benefit	
Maternity Allowance	
State Pension	
Workplace pension	
Private pension or annuity	
Pension Credit	
Income from savings & investments	
Board or rent	
Child maintenance (Regular?)	
Student loans & grants	
Private loan	
Gifts from family & friends	
Other financial support	
<b>Total monthly Income</b>	

**Spending (per month)**

**Household Bills**

Mortgage payment	
Rent	
Mortgage endowment	
Mortgage life insurance	
Mortgage payment protection insurance	
Ground rent	

Service charge	
Buildings insurance	
Contents insurance	
Council Tax or Rates	
Gas	
Electricity	
Other household fuel	
Water	
Home phone	
Mobile phones	
Internet/broadband	
Anti-virus and other IT costs	
TV licence	
Satellite or digital TV	
Cleaner, window cleaner, etc.	
Home maintenance	
Garden maintenance	
Appliance rental	
Boiler cover	
<b>Total Household Bills</b>	

**Living Costs**

Grocery shopping	
Takeaways	
Alcohol at home	
Cigarettes & tobacco	
Lunches & snacks	
Takeaway coffees, etc.	
Union/professional fees	
Children's clothes	
School uniform	
Shoes	
Work clothes	
New clothes for you	
Laundry and dry cleaning	
Hairdressing	
Beauty treatments	
Toiletries	
Eye care	
Dental care	
Prescriptions & medicines	
<b>Total Living Costs</b>	

**Insurance, Loans & Banking**

Life insurance	
Income protection insurance	
Critical illness insurance	
Payment protection insurance	
Credit card insurance	
Health insurance	
Dental insurance	
Overdraft charges and interest	
Bank account fees	
Penalties	
Loan repayments	
Student loan repayments	
Credit card repayments	
Hire purchase & catalogue repayments	
Regular saving	
Lump sum saving	
Payments into ISAs	
Buying shares & other investments	
Private pension contributions	
Pension contributions	
Long term care plan	
Funeral plan	
Financial & legal advice	
<b>Total Insurance, Loans &amp; Banking</b>	

**Family & Friends**

Childcare	
Nappies and baby items	
Activities & clubs	
Toys & treats	
Pocket money	
Babysitting	
Maintenance or child support	
School fees	
School bus	
School meals	
School trips	
School dinners	
After-school clubs	
Support for student children	

Support for other relatives

Food

Vet bills

Pet insurance

Donations & sponsorships

Loan repayment to family/friend

**Total Family & Friends**

**Travel**

Petrol/diesel

Insurance

Breakdown cover

Tax

Finance or loan repayment

Loan insurance

MOT

Maintenance & repairs

Parking & tolls

Bus, tube & tram fares

Trains

Taxis

Air travel

**Total Travel**

**Leisure**

Cinema & theatre trips

Days out

Books, music, films, games, etc.

Hobbies

Eating out

Going out for drinks/ social

Sport & gym

Lottery & gambling

Newspapers & magazines

Birthdays

Christmas

Other festivals & celebrations

Weddings

Holidays

Travel insurance

Spending money

**Total Leisure**

Household Bills	
Living Costs	
Insurance, Loans & Banking	
Family & Friends	
Travel	
Leisure	
<b>Total Monthly Spending</b>	

<b>Savings</b>	
Bank Deposits	
Other investments	
<b>Total Savings</b>	
<b>Total Monthly Income</b>	
<b>Total Monthly Spending</b>	
Difference	

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<sup>i</sup> Applicants may find it helpful to use the Money Advice Service online budgeting tool <https://www.moneyadviceservice.org.uk/en/tools/budget-planner>. The Money Advice Service, set up by government, provides free and impartial money advice. If you do use this tool, please transfer figures to this form.