

Assets & Liabilities

Customer Name:

Assets

Cash	<input type="text"/>	Total investment property (overseas)*	<input type="text"/>
Shares (listed)	<input type="text"/>	Jewellery, cars, art etc.	<input type="text"/>
Personal dwelling house	<input type="text"/>	Other investments	<input type="text"/>
Total investment property (UK)*	<input type="text"/>	Total assets (C)	<input type="text"/>

Liabilities

Mortgage (personal)	<input type="text"/>	Credit cards	<input type="text"/>
Mortgage (investment)	<input type="text"/>	Personal Guarantees	<input type="text"/>
Car loans/ hire purchase	<input type="text"/>	Other	<input type="text"/>
Personal loans	<input type="text"/>	Total liabilities (D)	<input type="text"/>