



STATEMENT OF MEANS

Full Name(s) _____

Address _____

Occupation(s) _____

Employer(s) _____

Date(s) of Birth _____

ANNUAL INCOME

Gross Salaries

(please detail any guaranteed bonuses separately)

• £
 •
 •

Add

Other Annual Income

(Please detail e.g. rentals, interest, dividend, fees etc.)

• £
 •
 •

Total Annual Income

£ _____

ASSETS

(please insert 'total values' next to each heading)

Property – main residence	£
Other property	£
Life policies – surrender values	£
Investments	£
Cash balances	£
Others (please detail on page two)	£
Total Assets	£ _____
Less	
Total Liabilities	£ _____
NET MEANS	£ _____

LOANS/LIABILITES

(please insert 'total values' next to each heading)

Mortgage/loans on main residence	£
Other property loans	£
Finance/Bank Loans	£
Guarantee Obligations	£
Others (please detail on page two)	£
Total Liabilities Outstanding	£ _____

Note: Please use page two of this form to complete asset and liability values in detail.

ASSETS AND LIABILITIES IN DETAIL

ASSETS		LIABILITIES	
PROPERTIES (please detail address, valuation amount and date)	£	PROPERTY LOANS (please detail amount outstanding, name of lender and final repayment date)	£
LIFE POLICIES (please detail company, surrender value and maturity date)	£	OTHER BANK / FINANCE COMPANY LOANS (please detail amount outstanding, name of lender and final repayment date)	£
INVESTMENTS (please detail company, type of investment and current valuation)	£	GUARANTEE OBLIGATIONS (please provide details)	£
CASH BALANCES (please detail company, amount and maturity date if applicable)	£	OTHERS (please provide details)	£
OTHER ASSETS (please give details)	£		
ASSETS – TOTAL VALUE	<u>£</u>	LIABILITIES – TOTAL VALUE	<u>£</u>

Total Assets	£
Less	
Total Liabilities	£
NET MEANS	<u>£</u>

Data Protection Statement

All personal information provided by you and any other information relating to your account(s) will be treated in confidence and will not be disclosed to any third parties, except where permitted by law, or in furtherance of your finance application with prospective lending institutions. However, information may be shared with other financial organisations to protect both ourselves and our customers against fraud. The information will be held in our computer system and may be used in the following ways:

- The information will assist us in providing the service for which you have applied.
- To keep you informed of other services which may be of interest to you. If you would prefer not to receive marketing information, please write and advise us.
- Where a lending decision is involved, the information will aid us in assessing the extent of the credit we will offer to you. In taking credit decisions, the Bank seeks to protect applicants from the dangers of over-commitment. Credit scoring may be used for credit assessment.
- Enquiries may be made with credit reference agencies and in such cases the agencies will keep a record of our enquiries. We will disclose to the agencies information about you in the event of you defaulting on a debt. All information received and recorded by credit reference agencies may be used by other lenders in making credit decisions about you and other members of your household.

These uses of your personal information are covered by our registration under the Data Protection Act. Under the terms of the Act, you have the right to obtain a copy of the information we hold about you, upon payment of the appropriate fee.

Signature(s)

Date
