



Financial health check

Monthly outgoings in retirement		
Mortgage/rent	£	
Council Tax	£	
Gas/electric/other fuel bills	£	
Water charges	£	
Telephone	£	
Car running costs	£	
Food and other consumables	£	
Clothes	£	
Entertainment/holidays	£	
Loan/credit card repayments	£	
Regular investments (<i>ie: insurance policies</i>)	£	
Sub total		£
Monthly income in retirement		
Pension from your scheme	£	
Pension from previous pension arrangements	£	
Basic state pension (<i>at state pension age</i>)	£	
State Earnings Related Pension / State Second Pension	£	
Other state benefits (<i>like Income Support</i>)	£	
Income from investments	£	
Any other monthly income	£	
Sub total		£
Total monthly balance (plus or minus)		£
Assets		
Lump sum from your scheme	£	
House	£	
Savings	£	
Shares	£	
Insurance policies	£	
Other investments	£	
Total assets		£