

STATEMENT OF MEANS



Full Name(s)

Address

Post Code

When did you move to this address?

Previous address if less than 3 years

Post Code

Occupation(s)

Employer(s)

Date(s) of Birth

Account Number

Sorting Code

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 2) £

Total Assets

£

Less

Total Liabilities

£

NET MEANS

£

LOANS/LIABILITIES

(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 2) £

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) <p style="text-align: right;">£</p>		PROPERTY LOANS (Please detail amount outstanding, name of lender and final repayment date) <p style="text-align: right;">£</p>	
INVESTMENTS (Please detail company, type of investment and current valuation) <p style="text-align: right;">£</p>		OTHER BANK/FINANCE COMPANY LOANS (Please detail amount outstanding, name of lender and final repayment date) <p style="text-align: right;">£</p>	
LIFE POLICIES (Please detail company, surrender value and maturity date) <p style="text-align: right;">£</p>			
CASH BALANCES (Please detail company, amount and maturity date if applicable) <p style="text-align: right;">£</p>		GUARANTEE OBLIGATIONS (Please provide details) <p style="text-align: right;">£</p>	
OTHER ASSETS (Please give details) <p style="text-align: right;">£</p>		OTHERS (Please provide details)	
ASSETS – TOTAL VALUE £ _____		LIABILITIES – TOTAL VALUE £ _____	
Total Assets £			
Less			
Total Liabilities £ _____			
NET MEANS £ _____			

Data Protection Act Declaration

By signing this document:

- * I confirm that I have read the information headed 'Uses of Data' and agree that the information I have provided in this application, and any other information relating to my account(s), may be processed and disclosed in the ways described.
- * I agree that my personal data may be shared with any company from time to time forming part of the same Group as Icthus Consultants together with the Introducer and any associated Companies (if applicable) and Insurers (if applicable) who may also use it in the ways described in the Uses of Data.
- * I agree that information on the performance of my account(s) may be shared with Credit Reference Agencies and may be used by other lenders for credit assessment.
- * I agree that any sensitive information obtained will only be processed in order to provide the service requested.
- * I am entitled to disclose information about any co-applicant or guarantor and/or anyone else referred to by me, and to authorise you to search and/or record information at Credit Reference Agencies about each of us. I understand that an "association" will be created at the Credit Reference Agencies, which will link our financial records.

Signature(s)

Date
