



# Hilltop

*financial planning*

## Personal Assets and Liabilities Guide.

During your Fact-Find call, we will be discussing your current assets and financial liabilities. Please use this guide as a prompt for the figures and information we will cover. The pension professional will be recording your responses throughout the call.

Assets	Value £ (based on recent valuation)	Address
Residential/Home Property		
Residential Rental Property (if applicable)		
Commercial Property (if applicable)		
	Value £ (based on recent valuation)	Details
Cash In Bank	£	
Cash Savings Account	£	
Investments/ISA & Cash ISAs	£	
	£	
	£	
	£	
Stocks & Shares	£	
Bonds/Premium Bonds	£	
Business Ownership (name & percentage owned)	£	
Vehicles	£	
Other Assets Not Listed	£	
	£	
	£	
Liabilities	Value Owed	Details (Type, Provider, Term)
Personal Loan	£	
Car Loan or PCP	£	
Credit Card Balance	£	
Overdraft	£	



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