Money to the Masses Black Box

Income & Benefits

Income / Benefit Type	Gross Amount	Net Amount	Frequency	Notes

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Outgoings

Name of Bill / Company Name	Amount	Payment Frequency	Payment Date	Account Name / Number	Notes

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Bank Accounts & Overdrafts

Bank Name	Account Type	Customer Names on Account	Account Number	Sort Code	Overdraft Limit	Current Balance	Notes

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Savings Accounts

Bank Name	Account Type	Customer Names on Account	Account Number	Sort Code	Current Balance	Notes

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Investments & Pensions

Institution Name	Account Type	Customer Names on Account	Account Number	Current Balance	Notes

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Credit Cards & Loans

Lender	Account Type	Customer Names on Account	Account Number	Credit Limit / Loan Amount	Interest Rate %	Minimum Monthly Payment	Outstanding Balance	Notes

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Mortgages & Secured Loans

Lender	Account Type	Customer Names on Account	Account Number	Loan Amount	Interest Rate %	Monthly Payments	Outstanding Balance	Notes

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Personal Insurance

Insurer	Policy Type	Policy Details (Sum Assured & Term)	Name of People Insured	Account Number	Premium Amount	Premium Payment Frequency (Annual or Monthly)	Notes

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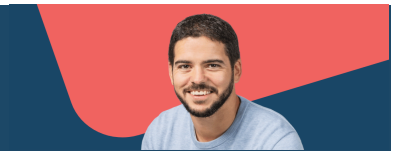
General Insurance



Insurer	Policy Type	Items Insured	Account Number	Premium Amount	Premium Payment Frequency (Annual or Monthly)	Notes

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Wills

Owner of Will	Location of Will	Date Last Updated	Notes