

Dear Applicant,

Please find two questionnaires that you will need to complete. The first questionnaire is the official one which needs to be duly filled in and signed. The second one is a budget form to give us more of an idea and understand where you are in your financial situation.

With the application, we need to have a copy of recent bank statements covering a period of three months.

You will also need to accompany your application with a covering letter or email explaining why you need financial help. Here are the documents to be provided:

- Copies of two utility bills
- Photocopy identity card or passport
- Three months of recent bank statements
- Info/copies of any other income
- Copies of states benefits you are receiving
- Covering letter with your address
- Two financial questionnaires

Following the reception of the documents requested, The Welfare Officer will get in touch with you to discuss your application and for further questions if needed.

Once your application is complete, the Welfare Officer will submit it to the trustees of the Swiss Benevolent Society who will then make the decision. The decision date will then be communicated to you.

If you need to ask any questions or need help in bringing your application together, please do not hesitate to get in touch with the office or by email. The office is open on Tuesdays and Wednesday only.

With best wishes,

The Welfare Officer

Swiss Benevolent Society
79 Endell Street
London WC2H 9DY

0207 836 9119
info@swissbenevolent.org.uk

Privacy notice:

As a client of the Swiss Benevolent Society we would like to let you know about our Data Privacy Notice.

We've been taking steps to comply with the new General Data Protection Regulation (GDPR) by 25 May 2018. We want you to know we've updated our Data Privacy Notice to explain how we store and handle your personal data.

You have various rights regarding your personal data, including seeing what data we hold and updating your information. The Swiss Benevolent Society treats your data with the utmost care and takes appropriate steps to protect it.

There's nothing you need to do right now, but if you'd like to find out more, do take a look at our [Data Privacy Notice](#).

If you have any questions or queries about this message, please do not hesitate to contact me, we would be happy to clarify any questions you may have on this.

Financial Questionnaire

All information given will be treated in the strictest confidence.
Your assistance will help us to determine how we can help you best.

First name Surname
 Date of Birth Are you a Swiss Citizen? Yes No

SECTION 1 OF 3: INCOME

1.1 Are you and/or your spouse/partner in gainful employment?

If yes, please state your joint monthly gross earnings: £

1.2 Do you and/or your spouse/partner receive Swiss Old Age Pension?

If yes, please state your joint monthly amount: £

1.3 Do you and/or your spouse/partner receive Employment Related Pension?

If yes, please state your joint monthly amount: £

1.4 Please state monthly (4 week) pension/benefits you and/or your spouse receive:

Income support	<input type="text"/> £	Bereavement Allowance	<input type="text"/> £
Pension credits	<input type="text"/> £	Child Tax Credits	<input type="text"/> £
State pension	<input type="text"/> £	Child Benefits CHB	<input type="text"/> £
Housing benefit	<input type="text"/> £	Disability Living Allowance (DLA/PIP)	<input type="text"/> £
Jobseeker's Allowance	<input type="text"/> £		
Universal Credit UC	<input type="text"/> £		

1.5 Do you and/or your spouse/partner have any other sources of income not included in the above question?

If yes, please state the amount per month: £

Please state the details of this income:

SECTION 2 OF 3: OUTGOINGS

2.1 Do you and/or your spouse pay rent or mortgage on your home?

If yes, please state monthly amount:

£

2.2 Do you and/or your spouse pay Council Tax?

If yes, please state monthly amount:

£

2.3 Do you and/or your spouse pay Care Costs?

If yes, please state monthly amount:

£

2.4 Do you and/or your spouse have any other major costs other than normal household costs which affect your financial circumstances?

If yes, please explain and state whether paid per week/month/annum:

_____ £ _____ per _____

_____ £ _____ per _____

_____ £ _____ per _____

SECTION 3 OF 3: SAVINGS

3.1 Do you and/or your spouse have any savings?

Please state your total amount of savings:

£

I hereby declare that all the provided information in this financial questionnaire is correct and truthful.

Signature

Date

Address

Phone no

Email

Payment details

All information given will be treated in the strictest confidence.

First name

Surname

Name on account

Sort code

Account number

Bank name

Address of bank

Your monthly budget

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MONTHLY INCOME

Income from work	£ <input type="text"/>
Benefit payments	£ <input type="text"/>
	£ <input type="text"/>
	£ <input type="text"/>
Grants	£ <input type="text"/>
Loans	£ <input type="text"/>
Pensions	£ <input type="text"/>
Other	£ <input type="text"/>
Total monthly income	£ <input type="text"/>

MONTHLY EXPENSES

Rent or mortgage	£ <input type="text"/>
Council Tax	£ <input type="text"/>
Gas	£ <input type="text"/>
Electricity	£ <input type="text"/>
Water	£ <input type="text"/>
Food	£ <input type="text"/>
Public transport	£ <input type="text"/>
Standing orders/ Direct debits	£ <input type="text"/>
Telephone/mobile phone contracts	£ <input type="text"/>
TV licence/other TV contracts	£ <input type="text"/>
Other	£ <input type="text"/>
Total expenses	£ <input type="text"/>

CALCULATE YOUR MONTHLY BALANCE

Total monthly income	£ <input type="text"/>
Total expenses	£ <input type="text"/>
Balance	£ <input type="text"/>