

**Financial Assistance**

Dear Member or Friend of the Swiss Benevolent Society,

Notes for filling in the application for Financial Aid

* About this form
* About Financial Aid
* Proof
* Filling in the form
* If you need help to fill in the form
* What to do next
* How SBS collects and uses information
* Changes you must tell SBS about

Once completed, the application including the required documents should be returned to:

info@swissbenevolent.org.uk

or

Swiss Benevolent Society

79 Endell Street

London

WC2H 9DY

# About this form

We have designed this application form to be easy to fill in. It may look rather long, but we need to ask enough questions to make sure that everyone who applies gets the right amount of financial aid.

You may not have to fill in all parts of the form (for example, a few questions would not apply to most pensioners) but you must fill in any part that is relevant to you.

# About Financial Aid

The Swiss Benevolent Society (‘SBS’) can provide financial help:

1. in emergencies: a special one-off payment
2. in the form of regular benefits: a one-year benefit paid every four weeks

# Proof

SBS will need to see proof of some of the things you write about in the application. There is a checklist in Part 5 of the application to help you. If you are not sure if SBS needs to see proof of something, get in touch with us. We will tell you what we need to see. We cannot pay you financial aid until we have seen the proof we need.

Applications will be checked by the SBS’s Welfare Officer and submitted to the SBS trustees who will then make the decision.

# Filling in the application

When filling in the application form, it is very important that you give us as much information as possible about your circumstances and that you provide us with the necessary evidence about your level of income.

If possible, use the PDF version to fill in the form. If you print it out use black ink to fill in the form. If you make a mistake, just cross it out and put the right answer next to it. Do not use correction fluid or tape.

Answer **No** or **Yes** questions by putting a **tick** in the relevant box. If you are picking an answer from a list of answers, **tick** the box which applies to you. Do not put a cross in any boxes. If you answer a question with a cross, SBS may have to send the form back, and this will delay the application.

If someone else fills in the form for you, there is a special space for them to sign.

# If you need help to fill in the form

If you need any help, contact our Welfare Officer. You can find the contact details on our website or ring 020 7836 9119 (Tuesdays and Wednesdays only).

Or you can get in touch with an organisation like your local Citizens Advice. You can find their contact details online.

# What to do next

When you have filled in the form, sign it and send it to SBS with the proof we need to see.

Do not send valuable items such as bank books or passports in the post.

If you cannot get the proof we need straight away, do not worry. Send the application to us with the proof you do have and let us know that you will be sending some proof later. If you do not send the form to us straight away, you might lose time.

# How SBS collects and uses information

SBS will use the information you give in this form, and in any supporting proof you send, to process your application for financial aid.

All the information you give us will be kept in strict confidence and will not be disclosed to a third party without your consent. SBS will do all we can to respect your privacy and to protect the personal information we acquire when you use our services. SBS is the data controller for the purposes of the Data Protection Act. For more information about privacy, please read our Privacy Notice Policy.

# Changes you must tell us about

Please notify us as soon as possible about any relevant changes. For example if:

* any of your children leave school or leave home
* anyone moves in or out of your home, including lodgers and subtenants
* your income or the income of anyone living with you, including benefits, changes
* your capital or savings changes
* you or anyone living with you becomes a student, starts a youth training scheme, goes into a hospital or a nursing home, goes into prison, or changes or leaves a job
* your rent changes
* you move to a new address
* you or your partner are going to be away from home for more than a month
* you or anyone living with you start work
* you receive any decision from authorities, such as the Home Office, Department for Work and Pensions, etc. or
* anything you have told us about changes.

This is not a full list. If you are not sure, ask us for advice. You must tell us about most changes. Contact us to find out how.

If you do not tell us about changes, you may lose money you are entitled to, or you may get too much financial aid.

# How we deal with your application

Following receipt of your application, you may receive written correspondence (letter, emails), a telephone call or a home visit as part of our assessment process. Visits will be arranged in advance by telephone.

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

**Financial Aid Application**

# Part 1: About you and your partner

Do you have a partner who normally lives with you? Yes [ ]  No [ ]

We use ‘partner’ to mean

* a person you are married to or a person you live with as if you were married to them, or
* a civil partner or a person you live with as if you were civil partners.

If you have a partner, you must answer all the questions about them, as well as yourself.

|  |  |  |
| --- | --- | --- |
|  | **You** | **Your partner** |
| Title (Mr, Mrs, Ms, other) | Click or tap here to enter text. | Click or tap here to enter text. |
| First name, including middle names | Click or tap here to enter text. | Click or tap here to enter text. |
| Surname | Click or tap here to enter text. | Click or tap here to enter text. |
| Address | Click or tap here to enter text. | Click or tap here to enter text. |
| Date of birth | Click or tap to enter a date. | Click or tap to enter a date. |
| Nationality | Click or tap here to enter text. | Click or tap here to enter text. |
| Other nationalities | Click or tap here to enter text. | Click or tap here to enter text. |
| Phone number (landline) | Click or tap here to enter text. | Click or tap here to enter text. |
| Phone number (mobile) | Click or tap here to enter text. | Click or tap here to enter text. |
| Email address | Click or tap here to enter text. | Click or tap here to enter text. |

Is the above address your only or main home? Yes [ ]  No [ ]

If not, please provide your other address: Click or tap here to enter text.

## Current living situation:

|  |
| --- |
| **What is your current living situation? Please tick all boxes that apply.** |
| Living in a home that I own (house, flat) [ ]  |
| Living in a rented home (house, flat) [ ]  |
| Living with relative(s) and/or partner [ ]  |
| Children under 16 or still in education [ ]  |
| How many and age of children Click or tap here to enter text. |
| Others and children who have left education [ ]  |
| How many and age of children Click or tap here to enter text. |
| Living in a household with other people (other lodgers, tenants, etc.) [ ]  |
| Living with no-one else, I live alone [ ]  |
| Temporarily staying with relative or friend(s) [ ]  |
| Temporarily staying in a shelter or homeless [ ]  |
| **Do you have the right to reside in the UK? This means you have the right to live in the UK. Please tick the box which applies to you:** |
| British citizen [ ]  |
| Citizen of Ireland [ ]  |
| I have pre-settled or settled status under the EU Settlement Scheme [ ]  |
| I have indefinite leave to remain in the UK (ILR) [ ]  |
| I am exempt from immigration control [ ]  |
| If you are a Swiss citizen, are you registered with the Swiss Embassy in the UK? [ ]  |
| **Please provide your share code:**  |

# Part 2: About your household income

What is your and your partner’s employment status? Tick the box or boxes that apply.

|  |  |  |
| --- | --- | --- |
|  | **You** | **Partner** |
| Looking for work | [ ]  | [ ]  |
| Employed (part or full-time) | [ ]  | [ ]  |
| Self-employed | [ ]  | [ ]  |
| Retired | [ ]  | [ ]  |
| None of the above | [ ]  | [ ]  |

## What other income do you and your partner receive?

## Tick the box or boxes that apply.

|  |  |  |
| --- | --- | --- |
|  | **You** | **Partner** |
| Benefits and financial support if you are looking for work or are on a low income: Jobseeker’s Allowance (JSA) and Universal Credit (UC), Housing Benefit, Support for Mortgage Interest (SMI) | [ ]  | [ ]  |
| Benefits and financial support if you are temporarily unable to work or if you are disabled or have a health condition: Employment and Support Allowance/Contribution-Based Employment and Support Allowance (ESA), Personal Independence Payment (PIP), Attendance Allowance | [ ]  | [ ]  |
| Benefits and financial support for families or you are caring for someone: Maternity pay and leave, Maternity Allowance, Paternity pay and leave, Sure Start Maternity Grant, Adoption pay and leave, Shared Parental Leave and Pay, Unpaid parental leave, Child Benefit (CHB), Child Tax Credit, Disability Living Allowance for children (DLA), Carer’s Allowance, Carer’s Credit |  |  |
| Benefits and financial support when someone dies: Bereavement Support Payment, Guardian’s Allowance, Statutory Parental Bereavement pay and leave, Widowed Parent’s Allowance |  |  |
| Self-employed | [ ]  | [ ]  |
| Retired: State Pension, Workplace Pension, Pension Credit | [ ]  | [ ]  |
| Are you or your partner waiting to hear about one of the above benefits/financial support you have claimed? If yes, please state which ones you or your partner have claimed for: |[ ] [ ]
| You: Click or tap here to enter text. Partner: Click or tap here to enter text. |
| None of the above | [ ]  | [ ]  |

## Do you or your partner have any bank accounts, savings, investments or property in the UK or abroad?

This includes cash, current accounts, savings accounts with a bank or building society, Post Office accounts, Premium bonds, National Savings Certificates, stocks and shares and money or property held in trust, including any trust set up for your children.

|  |  |  |
| --- | --- | --- |
|  | **You** | **Partner** |
| Bank/Building society/Post Office accounts | Yes [ ]  No [ ] How many accounts: Click or tap here to enter text.Total amount: Click or tap here to enter text. | Yes [ ]  No [ ] How many accounts: Click or tap here to enter text.Total amount: Click or tap here to enter text. |
| Premium bonds | Yes [ ]  No [ ] Total amount: Click or tap here to enter text. | Yes [ ]  No [ ] Total amount: Click or tap here to enter text. |
| Unit trusts, ISAs, PEPs, TESSAs, TOISAs or other investments | Yes [ ]  No [ ] How many: Click or tap here to enter text.Total amount: Click or tap here to enter text. | Yes [ ]  No [ ] How many: Click or tap here to enter text.Total amount: Click or tap here to enter text. |
| Income bonds or capital bonds | Yes [ ]  No [ ] How many bonds: Click or tap here to enter text.Total amount: Click or tap here to enter text. | Yes [ ]  No [ ] How many bonds: Click or tap here to enter text.Total amount: Click or tap here to enter text. |
| Money or property owned or held in trust | Yes [ ]  No [ ] How many: Click or tap here to enter text.Total amount: Click or tap here to enter text. | Yes [ ]  No [ ] How many: Click or tap here to enter text.Total amount: Click or tap here to enter text. |
| Any other savings or investments, including shares  | Yes [ ]  No [ ] How many: Click or tap here to enter text.Total amount: Click or tap here to enter text. | Yes [ ]  No [ ] How many: Click or tap here to enter text.Total amount: Click or tap here to enter text. |
| Any shares  | Yes [ ]  No [ ] Number of shares held: Click or tap here to enter text.Approximate value: Click or tap here to enter text. | Yes [ ]  No [ ] Number of shares held: Click or tap here to enter text.Approximate value: Click or tap here to enter text. |

To ensure a thorough assessment of your means-tested entitlement, please be sure to include ALL of your bank accounts in your application. Send us the bank statements for each account dating back to the application date, covering the last 3 months. These statements are vital for us to accurately calculate your entitlement, as they enable us to review your income and expenses. Your cooperation in providing this information is greatly appreciated.

## What is your household monthly (four weeks) income?

|  |  |  |
| --- | --- | --- |
|  | You (in £) | Partner (in£) |
| Employment income | Click or tap here to enter text. | Click or tap here to enter text. |
| Earned from self-employment, including share or director’s contributions  | Click or tap here to enter text. | Click or tap here to enter text. |
| Pension income, state and/or employment, including pension credits (UK and from abroad) | Click or tap here to enter text. |  Click or tap here to enter text. |
| Social security income (benefits/credits: as declared above) | Click or tap here to enter text. | Click or tap here to enter text. |
| Maintenance/child support (UK and from abroad) | Click or tap here to enter text. | Click or tap here to enter text. |
| Any other income (UK and from abroad) (as declared above), including contributions from others living with you or rent from properties | Click or tap here to enter text. | Click or tap here to enter text. |
|  |  |  |
| Total household income  | £ 0.00 | £ 0.00 |
|  |  |  |

# Part 3: About your household debt and loans/arrears

Do you or your partner have any loans and/or arrears?

|  |  |  |
| --- | --- | --- |
|  | **You** | **Partner** |
| Loans (i.e. bank or other financial institutions) | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| Rent or mortgage, including second mortgage/secured loan | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| Council tax | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| Gas or other fuels | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| Electricity | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| Telephone, Mobile phone | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| TV/Internet/Satellite | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| TV licence | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| Consumer credit cards/other bills, e.g. private loans, credit cards/store cards, catalogues | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |
| Court fines/County Court Judgment CCJ | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. | Yes [ ]  No [ ] Amount owed: Click or tap here to enter text. |

## What is your household monthly (four weeks) expenditure?

|  |  |
| --- | --- |
|   | **Household (in £)**  |
| Rent or mortgage (after benefit), including any service charges | Click or tap here to enter text. |
| Council Tax (after benefit) | Click or tap here to enter text. |
| Gas and/or other fuel (e.g. coal, oil) | Click or tap here to enter text. |
| Electricity | Click or tap here to enter text. |
| Water | Click or tap here to enter text. |
| Telephone/Mobile phone | Click or tap here to enter text. |
| TV/Internet/Satellite | Click or tap here to enter text. |
| TV licence | Click or tap here to enter text. |
| Food and housekeeping | Click or tap here to enter text. |
| Building/contents insurance | Click or tap here to enter text. |
| Endowment policy/Life insurance | Click or tap here to enter text. |
| Child care (after benefits) | Click or tap here to enter text. |
| Work expenses, including public transportation  | Click or tap here to enter text. |
| Car, including loan, tax, fuel, repairs, etc. | Click or tap here to enter text. |
| Loans/catalogues/repayments of arrears | Click or tap here to enter text. |
| **Total household expenditure**  |  **£ 0.00** |

## About the account you want to receive the Financial Aid.

Please tell us your account details below. You can only use an account in your name or a joint account.

|  |  |
| --- | --- |
| Name of the account holder (please write the name of the account holder exactly as it is shown on the statement) | Click or tap here to enter text. |
| Full name of bank or building society | Click or tap here to enter text. |
| Sort code (for example, 12-34-56) | Click or tap here to enter text. |
| Account number | Click or tap here to enter text. |
| Building society roll or reference number If you are using a building society account you may need to tell us a roll or reference number. This may be made up of letters and numbers, and may be up to 18 characters long. If you are not sure if the account has a roll or reference number, ask the building society. | Click or tap here to enter text. |

# Part 4: SUPPORTING STATEMENT

Please include this **supporting letter**, clearly indicating your address, stating what you are applying for and explaining to us how a payment from us will help you. In this letter you can tell us anything else you think we should know about.

Applicant:

|  |  |
| --- | --- |
| Full Name: |  |
| Address: |  |
|  |  |
| Postcode: |  |
| Phone Number: |  |
| Email: |  |

Please tick what you are applying for:

[ ]  Regular Financial Aid [ ]  One-Off Grant [ ]  Student Scholarship

Personal Statement

*How can a payment from SBS help you? Tell us anything, you think we should know about, to make an informed decision. You can also mention any other areas you would need help in.*

|  |
| --- |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

Date: Click or tap here to enter text.

Signature of the person applying:Click or tap here to enter text.

# Part 5: What you should include with your application

Please tick to say what proof you are sending with this form. **If you can, do not send original documents**, only copies please. If you do not provide all the proof needed, we might not be able to support you. We need the same proof for your partner if you have one.

|  |  |  |
| --- | --- | --- |
|  | **You** | **Partner** |
| **Proof of identity** Such as a passport, driving licence or ID card | [ ]  | [ ]  |
| **Proof of capital, savings and investments** Such as all your bank, building society or Post Office books, full bank statements, or certificates for Premium bonds, National Savings Certificates, ISAs, stocks, shares and unit trusts. We need to see proof of any interest or dividends you get on investments and savings. The proof you send must show details for at least the past 3 months. | [ ]  | [ ]  |
| **Proof of your earnings**This means your last 3 payslips (if you are paid every week, 5 payslips). If you are self-employed, we need to see your accounts for the last financial year or, if you have been trading for less than 6 months, a summary of your trading records so far.  | [ ]  | [ ]  |
| **Proof of other income**Such as pension slips from a former employer or a letter from a court showing how much maintenance you are getting, as well as any other income you have stated above. | [ ]  | [ ]  |
| **Proof of benefits, allowance or pension**Such as current award notices or letters from benefits agencies (DWP, Council, etc.) confirming how much you get. | [ ]  | [ ]  |
| **Proof of expenditure**Such as a rent agreement (or letter from your landlord), mortgage agreement, utility bills (gas, electric, TV/internet-related bills, telephone-related bills, etc.) | [ ]  | [ ]  |
| Recent bank statements for all Bank Accounts for the past 3 months | [ ]  | [ ]  |
| **Supporting Letter** | [ ]  | [ ]  |

# Part 6: Declaration

Please read this declaration carefully before you sign and date it.

* **I understand** that this application is made to the Swiss Benevolent Society.
* **I declare** that the information I have given on this form is correct and complete
to the best of my knowledge.
* **I have read and understand** the [Privacy Notice Policy](https://www.swissbenevolent.org.uk/wp-content/uploads/2023/10/SBS_Privacy_Notice_October_2023.pdf).
* **I agree** that the Swiss Benevolent Society will use the information I have provided to process my application for financial aid. The Swiss Benevolent Society may check some of the information with other sources as allowed by the law and/or I have given consent.
* **I understand** that the Swiss Benevolent Society may use any information I have provided in connection with this and any other application or requests that I have made or may make. The Swiss Benevolent Society may give some information to other organisations, such as government departments, local authorities and private-sector companies (i.e. estate agencies), if the law allows this and/or you I given consent.
* **I declare and know** that I must let the Swiss Benevolent Society know straight away about any change in my circumstances which might affect my application.

Date: Click or tap here to enter text.

Signature of the person applying:Click or tap here to enter text.

**If this form has been filled in by someone other than the person applying for financial aid, please tell us why you are filling in this form for the person:**

Click or tap here to enter text.

Name of the person and if applicable name of the organisation who filled in the form
Click or tap here to enter text.

Date and Signature Click or tap here to enter text.

Relationship to the applicant Click or tap here to enter text.