Guidance for completing the financial assessment form

If you would like to apply for help funding your social care, you will need to complete the financial assessment form.

To help us assist you in understanding how your care will be funded, you should ensure that you know who your allocated financial assessment officer is.

If you have any questions or need help, you can call the charging helpline on: 020 8760 5676. The financial assessment team can be contacted on: 020 8726 6000 ext 60633

Information we will need to carry out your financial assessment:

- To calculate if you are eligible for financial help, we only need financial information about the person receiving service. Throughout the financial assessment form, we refer to the person receiving care as the service user and 'You'.

- As you complete the form, guidance notes will tell you about the kinds of information we will need from you to verify your details. If you are sending in your completed form to us by email or post it is very important that you remember to include photocopies of information that is required.

- It is important to know that some people are exempt from paying for their care. In order for us to understand if you are exempt, we will need you to complete and return the form. For more details about charging exemptions, please click here and read page 4 section 3.24 of our charging policy.

- If you fail to complete the form within 28 days of your referral, we will assume that you are happy to pay the full cost for your care and that you do not require financial help. We will then arrange for invoices to be sent to you for the full cost of the service received.

- If you would like us to check that you are getting all the welfare benefits you are entitled to please ensure you provide information about your spouse/partner/civil partner where requested throughout the form. This will help us identify any additional income you may be entitled too.

- So that we can accurately financially assess how much you can afford to pay towards the cost of your care and therefore how much we pay towards your care and support, please ensure you provide the following information for a member of staff to verify.

- Income and Savings
  - Bank statements / Post Office Accounts for all accounts you hold dating back to the last 6 months
  - Savings accounts statements or passbooks for the last 6 months

- Statements or passbooks for an ISA's or other investments you have, including Post Office accounts
- Documents detailing all income including from a private pension (s) you may have etc.
- Letter from Department of Work and Pensions (DWP) with details of state pension or any other benefits you receive such as DLA or AA etc

- Property you owned/sold in the last 5 years
  - Documents showing the sale of the property and proceeds received
- Please provide documents to verify how much you spend on the following items
  - Gas and electricity bills for your home
  - Rent / Mortgage repayments
  - Council tax
  - Extra costs related to disability or infirmity e.g. Travel
- Power of Attorney – If you have registered someone to have power of attorney over your financial affairs then we will need to see documentation to verify this.

- If you require more space to give information, please use Page 12 and attach additional sheets of paper if necessary.

- When you are happy the form is complete, please sign the declaration on page 10 and the customer consent on page 11.

- The form should be returned to: Financial Assessment Team, Bernard Weatherill House (BWH), 8 Mint Walk, 3rd Floor, Zone C, CR0 1EA