

FOR HELP FILLING IN THIS FORM, PLEASE REFER TO THE GUIDANCE NOTES PROVIDED

Application for Financial Assistance – In Confidence
All sections must be completed to prevent delay

| I. Your Details [See Note 1] | | | | | | | | | | | |
|-------------------------------------|--------|---|---------------------|---|---------------------------|--|-----------|-------------|----------|----------|---------|
| Surname | | | | | First Name | | | | | Title | |
| Address | | | | | | | | | | | |
| Town | | | | | County | | | | | Postcode | |
| Telephone No | | | | | Mobile No | | | | | | |
| Email address | | | | | | | | | | | |
| National Insurance No | | | | | | | | Nationality | | | |
| Date of Birth | d | d | | m | m | | y | y | y | y | |
| Marital Status | Single | | Living with Partner | | Married/Civil Partnership | | Separated | | Divorced | | Widowed |

| If you are filling in this form on behalf of the applicant, please provide your details below [See Note 1] | | | | | | | | | | | | |
|---|--|--|--|--|-----------|--|--|------|------|--|--|--|
| Name | | | | | | | | | | | | |
| Address | | | | | | | | | | | | |
| Telephone No | | | | | Mobile No | | | | | | | |
| Email address | | | | | | | | | | | | |
| Relationship to applicant | | | | | | | | | | | | |
| Signed | | | | | | | | Date | | | | |
| Who should be the main contact for this application? | | | | | Applicant | | | | Both | | | |

| 2. Spouse/Partner Details [See Note 2] | | | | | | | | | | | |
|---|---|---|--|---|------------|--|---|---|---|----------|--|
| Surname | | | | | First Name | | | | | Title | |
| Address | | | | | | | | | | | |
| Town | | | | | County | | | | | Postcode | |
| Telephone No | | | | | Mobile No | | | | | | |
| Email address | | | | | | | | | | | |
| Date of Birth | d | d | | m | m | | y | y | y | y | |

3. Household Members and Dependents [See Note 3]

Tell us who lives in your home and/or anyone that you are financially responsible for

| Name | Relation | Date of Birth | In Education | Employed/ Unemployed | Weekly payment to household |
|------|----------|---------------|--------------|-------------------------|--------------------------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Do you, your spouse/partner, household members or dependents have any significant health issues or disabilities?
If so, please provide details:

4. Employment History [See Note 4]

Give details of your current or previous employment, even if now retired

| Employer | Job Description | Dates | Union belonged to (optional) |
|----------|-----------------|-------|------------------------------|
| | | | |
| | | | |
| | | | |

Give details of your spouse's/partner's current or previous employment, even if now retired or deceased

| Employer | Job Description | Dates | Union belonged to (optional) |
|----------|-----------------|-------|------------------------------|
| | | | |
| | | | |
| | | | |

Give details of your parents' current or previous employment, even if now retired or deceased

| Employer | Job Description | Dates | Union belonged to (optional) |
|----------|-----------------|-------|------------------------------|
| | | | |
| | | | |
| | | | |

Give details of your children's current or previous employment

| Employer | Job Description | Dates | Union belonged to (optional) |
|----------|-----------------|-------|------------------------------|
| | | | |
| | | | |
| | | | |

5. Grant Request Details [See Note 5]

Which type of grant(s) are you applying for?

Regular Financial Assistance

One-Off Grant

If applying for a one-off grant, please describe the purpose of the grant:

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

What is the total cost of your need?

£

What amount are you seeking?

£

Have you applied to us before?

Yes

No

How did you hear about the Printing Charity?

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

Have you applied to any other Charities, Trusts and/or your Local Authority for help?

Yes

No

If yes, please provide details below and give the results (if known):

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

Have you checked your benefit entitlements? Agencies that can assist include: your Local Authority, DWP, Citizens Advice, Age UK and Turn2Us

Yes

No

If yes, please provide details below:

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

6. Income Details [See Note 6]Indicate the net **WEEKLY** income after tax, etc.

| | You £ | Spouse/Partner £ |
|---|-------|------------------|
| Wage / Salary (Net) | | |
| Universal Credit | | |
| Working Tax Credit | | |
| Income Support | | |
| Job Seekers Allowance | | |
| Employment and Support Allowance / Incapacity Benefit | | |
| Statutory Sick Pay | | |
| Statutory Maternity/ Paternity or Shared Parental Pay | | |
| Maternity Allowance | | |
| Other people(s) total household contributions | | |
| State Pension | | |
| Workplace / Private Pension(s) | | |
| Bereavement Allowances | | |
| Pension Credit | | |
| Child Tax Credit | | |
| Child Benefit | | |
| Child Maintenance received | | |
| Charitable Support | | |
| Gross Income | | |
| Personal Independence Payment / Disability Living Allowance | | |
| Disability Premiums/ Benefits | | |
| Attendance Allowances | | |
| Carer's Allowance | | |
| Any other disability income | | |
| Total Disability Income | | |

7. Capital/Savings [See Note 7]Give the total current amount

Do not leave any boxes blank, if no savings exist please enter 'zero'

| | You £ | Spouse/Partner £ |
|----------------------------------|-------|------------------|
| Bank Accounts | | |
| Building Societies | | |
| Post Office Accounts | | |
| Investments (ISAs, PEPs, TESSAs) | | |
| Premium Bonds | | |

| | | |
|---|--|--|
| Stocks and Shares | | |
| Life Assurance | | |
| Value of any properties you own <u>other</u> than the house you live in | | |
| Redundancy Pay / Compensation | | |
| Total: | | |

8. Housing Details [See Note 8]
 Tick the type of property you currently occupy and provide the date you moved in

| | | |
|--|--|--|
| <input type="checkbox"/> Owned – no mortgage | <input type="checkbox"/> Owned – with mortgage | <input type="checkbox"/> Shared Ownership |
| Property Value £ | Property Value £ Mortgage Outstanding £ | Percentage owned/ Property Value Mortgage Outstanding £ |
| <input type="checkbox"/> Rented – Council | <input type="checkbox"/> Rented – Private | <input type="checkbox"/> Rented – Housing Association |
| <input type="checkbox"/> Sheltered Accommodation | <input type="checkbox"/> Residential Care Home | <input type="checkbox"/> Nursing Home |

Date you entered the residence:

| Amount of benefit received £ | |
|-------------------------------|--|
| Housing Benefit | |
| Support for Mortgage Interest | |
| Council Tax Reduction | |

| Disposal of Assets | |
|---|--|
| Have you disposed of any assets within the last 5 years? e.g. sold or gifted a property or shares? | |
| Yes - Please give details | |
| No | |

9. Housing History [See Note 9]
 Give details of your previous addresses over the past 3 years

| Address | Postcode | Dates | Did you own the property |
|---------|----------|-------|--------------------------|
| | | | |
| | | | |
| | | | |

10. Debts [See Note 10]
 e.g. Mortgage, Bank Loans, Credit Cards, Hire Purchase, all other Debts or Loans

| Name of Creditor | Purpose | Monthly £ | Balance Owed £ |
|------------------|---------|-----------|----------------|
| | | | |
| | | | |
| | | | |

What action or advice have you taken about your debts?

II. Expenditure [See Note 11]
Provide figures in terms of a weekly amount

| | You £ | Spouse/Partner £ | Arrears £ |
|--|-------|------------------|-----------|
| Rent (less Housing Benefit) | | | |
| Mortgage(s) (less Support for Mortgage Interest) | | | |
| Council Tax (less Council Tax Reduction) | | | |
| Ground Rent / Service Charge | | | |
| Buildings / Contents Insurance | | | |
| Water Rates | | | |
| Gas / Electricity | | | |
| Other Fuels e.g. Calor gas, oil, coal | | | |
| Childcare costs e.g. childminder, nursery | | | |
| Child Maintenance paid | | | |
| Maintenance for ex-partner/ spouse | | | |
| Care costs | | | |
| Total: | | | |
| Food | | | |
| Clothing | | | |
| Mobile Phone | | | |
| Telephone / TV costs / Broadband | | | |
| Household goods e.g. furniture, appliances | | | |
| Social participation | | | |
| Car costs (including finance) | | | |
| Public transport / Taxis | | | |
| Personal goods and services e.g. toiletries, prescriptions, dentist, glasses | | | |
| Life Assurance / Insurance | | | |
| Any other above-average costs/expenses: | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total: | | | |

12. Supporting Statement (Optional) [See Note 12]

Include details of family caring responsibilities, voluntary work, civic service, trade union service and any other work or activity, paid or voluntary, that you feel should support your application.

Empty box for supporting statement details.

13. Declaration [See Note 13]

All the information provided in the application form is true and correct. Full disclosure of all income, capital, savings and investments has been made and I will inform The Printing Charity of any change in circumstances that I may have during the application process.

I give permission for The Printing Charity to contact other charities and third parties who may be able to offer assistance.

I give permission for The Printing Charity to make checks to verify the information I have provided. I understand that this may include The Printing Charity contacting other charities and third parties and accessing information in the public domain and searching via social media platforms.

I understand that any false or misleading information can result in the withdrawal or repayment of any grant that may be awarded.

I have read The Printing Charity’s Privacy Notice for Beneficiaries and I consent to the collection, use and disclosure of my personal information, including my health information, as described to me in the Privacy Notice for Beneficiaries. I understand that if I have any questions about the Privacy Notice for Beneficiaries or the charity’s privacy practices, including any requests to exercise my legal rights under the Data Protection Act 2018, then I can contact the Head of Compliance & Central Services by email at: support@theprintingcharity.org.uk or by post at: First Floor, Underwood House, 235 Three Bridges Road, Crawley, West Sussex, RH10 1LS.

| | |
|------------------------------|--|
| Signed (you) | |
| Signed (your spouse/partner) | |
| Date | |

14. Supporting Documents [See Note 14]

Please enclose the following documents with your application:

| | |
|--|--|
| Most recent bank and building society statements | |
| Most recent pay slip or pension details | |
| Most recent Council tax bill | |
| Rental agreement showing amount paid | |
| DWP correspondence showing benefit received | |
| Any other documents to support your application | |

Return your completed form to:

The Printing Charity
First Floor, Underwood House,
235 Three Bridges Road,
Crawley, West Sussex
RH10 1LS

Telephone: 01293 542820
Email: support@theprintingcharity.org.uk
Website: www.theprintingcharity.org.uk

Continue to BACS form

Grant Payment by BACS [See Note 15]

| | |
|---------------------|--|
| Name | |
| Address | |
| Telephone no | |

Give details of the account to which payment will be sent to:

| | |
|--|--|
| Name of bank / building society | |
| Branch | |
| Payee name | |

Account number (8 digits)

Sort code (6 digits) - -

Roll number (Building societies only) _____

| | | | |
|------------------|--|-------------|--|
| Signature | | Date | |
|------------------|--|-------------|--|

If payment is to be made to a third party*, complete authority below:

| | |
|----------------------------|--|
| Name of third party | |
| Address | |
| Telephone no | |

| | | | |
|------------------|--|-------------|--|
| Signature | | Date | |
|------------------|--|-------------|--|

* Please note: Payment cannot be made to other individual's accounts. Third party payments are where the application has been submitted via another organisation who will administer the grant on our behalf, for example, SSAFA.

Continue to Employment History Request form

Employment History Team
PT Operations
North East England
HM Revenue and Customs
BX9 1AN

To: **HM Revenues & Customs**

Name: _____

Date of Birth: _____

Current address: _____

National Insurance No: _____

Previous address: _____
(Fill in if you have moved in the last 5 years)

I hereby give my permission for full details of my Employment History record to be provided to The Printing Charity. This should include my employers' names and relevant tax years.

Signature: _____

Date: _____

Name: _____

Continue to Privacy Notice

Privacy Notice - How we use your Information

The Printing Charity collects and processes personal data relating to its beneficiaries to help us provide them a service. The organisation is committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

What information does The Printing Charity collect?

The organisation collects and processes a range of information about you. This may include:

- your name, address and contact details, including email address and telephone number, date of birth and gender;
- details of your financial situation including any income and assets;
- details about where you live;
- details of your work history;
- details about your family and/or spouse;
- information regarding your medical, health conditions, mobility and social factors;
- details of your bank account;
- information about your marital status, next of kin, dependants and emergency contacts;

The organisation may collect this information in a variety of ways. For example, data might be collected through application forms, supporting documents you may provide, telephone calls and letters.

The organisation will only seek information from third parties with your consent (for example, contacting your GP).

Data will be stored securely on our financial accounting software – Sage, our CRM – Salesforce, and in hard copies filed in restricted access locked cabinets. Data may also be stored within our email system if we correspond with you in that way.

Why does The Printing Charity process personal data?

The organisation needs to process data to ensure that applicants are eligible to receive financial assistance or housing from the Charity and to meet its obligations to the service user. For example, it needs to process your data to consider you for financial assistance, or to enter into a Licence to Occupy agreement to reside in our sheltered homes, and then to ensure you are receiving the full service to which you are entitled.

In some cases, the organisation needs to process data to ensure that it is complying with its legal obligations. For example, it is required to check that you are a resident of the UK.

In other cases, the organisation has a legitimate interest in processing personal data before, during and after the relationship. Processing service user data allows the organisation to:

- maintain accurate and up-to-date records and contact details (including details of who to contact in the event of an emergency for residents of the Sheltered Homes);
- monitor and report on its performance in relation to its charitable objectives;

Some special categories of personal data, such as information about health or medical conditions, is processed to allow the Charity to adequately assess the suitability of the service user prior to receiving the Charity's services.

Who has access to data?

Your information may be shared with other Printing Charity employees whose access is necessary in the performance of their role.

The organisation will only share your data with third parties when we have your explicit consent, for example, to obtain medical assessments or information from other charities and organisations in respect of any application you make to us

The Charity uses Salesforce as its CRM and has agreements in place with Salesforce in respect to the storage of your information. Salesforce operates under the EU-US Privacy Shield and has appropriate protection in place for any data held outside of the European Economic Area (EEA).

The Charity will not transfer your data to countries outside the EEA.

How does The Printing Charity protect data?

The Printing Charity takes the security of your data seriously and has internal policies and controls in place to try to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by its employees in the performance of their duties. All hard copies are kept in a locked cupboard, and only accessed by staff members to whom access to the data is necessary for performance of their roles. All electronic information is kept securely on Sage and on Salesforce. Access to this information is also restricted. Home Managers also keep limited resident information in locked cupboards with restricted access.

For how long does the organisation keep data?

The organisation will hold residents' personal data for 12 months after the Licence to Occupy has ended. The organisation will hold other service-user records indefinitely to enable due-diligence in case of reapplication and accurate reporting.

Your rights

You have a number of rights. You can:

- access and obtain a copy of your data on request;
- require the organisation to change incorrect or incomplete data;
- require the organisation to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing; and
- object to the processing of your data where the organisation is relying on its legitimate interests as the legal ground for processing.

If you would like to exercise any of these rights, please contact Tabitha Northrup, Head of Compliance & Central Services, at tabitha@theprintingcharity.org.uk or email sar@theprintingcharity.org.uk. We will need to verify your identity before we can act upon your request.

If you believe that the organisation has not complied with your data protection rights, you can complain to the Information Commissioner. Please visit <https://ico.org.uk/concerns> for more information, or telephone 0303 123 1113 for advice.

What if you do not provide personal data?

The data requested from you is necessary for the Charity to determine the right type of support for each individual. If the data is not provided, the Charity may not be able to give any assistance.

Automated decision-making

Decisions are not based on automated decision-making. Policies are in place to ensure that each application is treated fairly, consistently and in accordance with the individual's needs.