Application Guidelines

Supporting Documentation

All applications need to be supported by documentation.

We'll require proof of household income, expenditure and savings with all applications.

This includes

- Evidence of wages for past three months. This could be payslips, p45 or bank statements if wages are paid into bank account *and/or*

- Evidence of any state benefits received. This includes JSA, ESA, Universal Credit, Tax Credits, Pension Credit, Housing Benefit, Council Tax Support and any disability benefits. This could be bank statements, if payments are made into their bank account, or correspondence from the DWP/Local Authority *and/or*.

- Evidence of State Retirement Pension and any personal or occupational pensions. This could be bank statements, if payments are made into their bank account, or correspondence from the pension provider.

- Evidence of any savings. This could include passbooks, statements or share certificates.

- Evidence of outgoings. This should include copies of fuel bills, telephone bills, rent or mortgage payments, insurance payments, loan or credit card repayments.

- Three most recent bank/building society statements.

- Evidence of debts and any repayment arrangements.

If it is difficult to obtain photocopies, etc., please send in the originals and we will return them to you immediately.

Completing the form

Please complete all the sections on the form that apply to your client with as much detail as you can, paying particular attention to the following sections:

Work History

As we are the trade charity for the drinks industry, the application for assistance is based on your client's (or their spouse's/partner's) work within our industry. Please complete this section of the form with as much detail as possible.

We will also need proof of your client's work history within the drinks industry, so please send in copies of any documents they have, such as old payslips (providing they contain the name of the company they worked for), P45's, P60's, personal license, business accounts, references, letters from previous employers, photographs of them at work, newspaper clippings. If your client does not have any documents of this type, please ask them to complete and sign HMRC form (available to download from our website). This form will give us authority to ask HMRC to release details of your client's previous employers.

Reason for Application

Please provide us with as much information as possible about your client's circumstances and what help they are seeking. It would also be helpful if you could outline how this help would improve their situation.

Reimbursement

Please note that we can't consider paying for an item that your client has already purchased, unless there are exceptional circumstances. If this applies to your client, please contact us to discuss the situation before completing the form.

Payee Details & Quotes

Please note that we can only pay grants directly to an individual in certain circumstances.

We will usually make payment directly to the organisation supplying the item or service or to a responsible organisation (i.e. The Royal British Legion), which is able to administer the grant on our behalf. However, if your client is seeking help with electrical items or furniture, we can source these through our preferred supplier. If your client requires help with floor coverings, decoration costs etc., it would be helpful to have the quotes at the time of application.

Declaration Statement

Please ask your client to read this section of the form carefully then sign and date it. We can't process the application if your client (and their spouse/partner where applicable) does not sign this section.

Application Process

- Completed application forms are checked through by our Charity Services team within a couple of days of their arrival. If there is any information missing or we have any queries, we will contact the referring agency or the applicant directly depending on the nature of the query.
- We have a team of Charity Services Volunteers who can visit new applicants, if this is necessary. The purpose of these visits is to ascertain the most appropriate ways in which the charity may be able to help your client.
- Once we have all the required information we require, the application will be

presented to our Charity Services Committee for consideration. This can take up to 4 weeks depending on the date the application was received. We can make emergency decisions more quickly in certain circumstances.
- We'll inform you of the decision by phone and in writing. If we can't help your client, we'll explain why.

PLEASE NOTE

Your application will be delayed if it is incomplete or if you do not provide all the supporting documentation required.

If you have any questions or queries about any part of this form or what we require, please do not hesitate to get in touch on 01344 898550.